Oversight and Governance
Chief Executive's Department
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Published 30 November 2021

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Wednesday 8 December 2021
2.00 pm
Council House

Members:
Councillor Bingley, Chair

Councillor Dr Buchan, Vice Chair

Councillors Coker, Dr Cree, Hendy, Jordan, Patel, Penberthy, Salmon and Wakeham.

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.

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Tracey Lee
Chief Executive

Brexit, Infrastructure and Legislative Change 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 - 14)**

To confirm the minutes of the previous meeting held on 15 September 2021.

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. Policy Update **(Pages 15 - 20)**

6. Destination Plymouth Progress Report on Visitor Plan 2030 **(Pages 21 - 188)**

7. Plymouth Sound National Marine Park **(Pages 189 - 294)**

8. Culture Plan Update **(Pages 295 - 338)**

9. Climate Emergency Action Plan (CEAP) 2022 **(Pages 339 - 380)**

10. Corporate Carbon Reduction Plan (CCRP) 2022 **(Pages 381 - 388)**

11. Work Programme: **(Pages 389 - 392)**

12. Tracking Decisions: **(Pages 393 - 398)**

13. Exempt Business

To consider passing a resolution under Section 100A(4) of the Local Government Act 1972 to exclude the press and public from the meeting for the following item of business on the grounds that it involves the likely disclosure of exempt information as defined in paragraph 3 of Part 1 of Schedule 12A of the Act, as amended by the Freedom of Information Act 2000.

PART II (PRIVATE MEETING)

Agenda

MEMBERS OF THE PUBLIC TO NOTE:
that under the law, the Committee is entitled to consider certain items in private. Members of the public will be asked to leave the meeting when such items are discussed

14. Destination Plymouth Progress Report on Visitor Plan 2030 (To Follow)

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Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Wednesday 15 September 2021

PRESENT:

Councillor Bingley, in the Chair.
Councillor Dr Buchan, Vice Chair.
Councillors Coker, Cree, Hendy, Jordan, Patel, Penberthy, Salmon and Wakeham.

Also in attendance: Paul Barnard (Service Director for Strategic Planning and Infrastructure), Julia Blaschke (Partnerships Manager), Kelly Blockley (Performance Advisor), Hannah Daw (Performance Advisor), David Draffan (Service Director for Economic Development), Councillor Jonathan Drean (Cabinet Member for Transport), Toby Hall (Economic Development Officer), Councillor Nick Kelly (Leader of the Council), David Northey (Head of Integrated Finance), Amanda Ratsey (Head of Economic Enterprise and Employment), Rosemary Starr (Sustainable Transport Manager), Mr Richard Stevens (Managing Director for Go South West), Sophie Tucker (Senior Support and Research Assistant).

The meeting started at 2.00 pm and finished at 5.10 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.

12. **Declarations of Interest**

The following declarations of interest were made in accordance with the code of conduct -

Member	Subject	Reason	Interest
Councillor Dr Buchan	Item 7 Economic Intelligence Update	Husband employed by Plymouth College of Art Council Representative and Vice Chair of Devon and Severn Inshore Fisheries and Conservation Authority Cattewater Harbour Commissioners (Board Member)	Personal
Councillor Jordan	Item 7 Economic Intelligence Update	Non-executive director of a community photographic studio	Personal

13. **Minutes**

The Committee agreed that the minutes of the meeting held on 14 July 2021 are a correct record.

14. **Chair's Urgent Business**

There were no items of Chair's urgent business.

15. **Brexit, Infrastructure and Legislative Change Policy Update**

Sophie Tucker (Senior Support and Research Assistant) provided an update to the briefing that had been circulated with the agenda, which included –

(a) fishing -

- on 25 August 2021 the Fisheries and Seafood Scheme funding rounds had opened for applications; the funding rounds were for specific purposes which did not meet the Council's current needs; however, information on the grants had been circulated to relevant parties through the Fisheries Group;

- also in the last few days, the UK Government had announced the first investment from £100m UK Seafood Fund to boost innovation in the fishing industry; fishing businesses across the UK would now have access to £24m of investment to develop technology, trial new gear and support world-class research to improve the productivity and long-term sustainability for the industry; further details on how to bid for funding for both of these schemes will be announced in due course;

(b) European Settlement Scheme -

- the European Settlement Scheme was now closed for new applications; there were some exceptions for some particularly vulnerable groups; the Home Office was continuing to encourage those who were eligible to make a late application to the EU Settlement Scheme;

- the latest data available showed that there were a total of just over six million applications nationally and 10,820 applications in Plymouth;

(c) Boarder Control Posts -

- the Government had recently announced a revised timetable for introducing full import controls for goods being imported from the EU to UK; new controls and requirements due to be introduced from 1 October 2021 and 1 January 2022 had been delayed to 1 January 2022 and 1 July 2022;

full customs declarations and controls would be introduced on 1 January 2022 as previously announced, although safety and security declarations would now not be required until 1 July 2022;

- controls would be phased in across 2022 under the revised timetable;

(d) trade deals -

- whilst no new trade deals had been signed since the previous meeting, the UK and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) nations formally launched negotiations in June 2021; progress had been made with New Zealand, with both countries committed to concluding a free trade agreement and the sixth round of free-trade agreement negotiations taking place in July 2021;

(e) Bills going through Parliament/key dates -

- the National Insurance Contributions Bill was currently awaiting its second reading in the House of Lords;

- 1 October (extendable to July 2022) the deadline for determining whether UK meets the conditions for exchanging personal data (DNA profiles, fingerprint and vehicle registration data) under the Prüm framework;

- 1 October 2021 EU, EEA and Swiss citizens would require a passport to travel to the UK, rather than using national identity cards as an alternative.

The Committee –

(f) raised whether the Council had plans to apply for a share of £30m Changing Places toilets (CPTs) fund administered by the Ministry of Housing, Communities and Local Government; the fund was available to install life-enhancing changing places toilets in public places, tourist attractions and transport networks; CPTs were larger accessible toilets for people who could not use standard toilets; the closing date for applications was 26 September 2021;

response: a written response would be provided regarding whether the Council had applied for this funding;

(g) sought clarification on how many trade deals were currently in place;

response: there were 67 trade deals in place but an update would be provided to the Committee outside of this forum.

16. **Plymouth Bus Service Improvement Plan 2021**

Councillor Jonathan Drean (Cabinet Member for Transport), Paul Barnard (Service Director for Strategic Planning and Infrastructure), Rosemary Starr (Sustainable Transport Manager) and Mr Richard Stevens (Managing Director for Go South West) presented this report which highlighted the following key points –

(a) on 15 March 2021, the Government published the National Bus Strategy for England 'Bus Back Better'; the strategy sets out an ambitious vision to dramatically improve bus services across England (outside London) to first reverse the long-term decline in the number of journeys made by bus and secondly to encourage passengers back to the bus, post the Covid19 pandemic; it was intended that the strategy would deliver cheaper, more frequent and more reliable bus services for passengers; the strategy required the establishment of a formal partnership arrangement, led by the City Council as the Local Transport Authority, for all local bus services operated within the city boundary;

(b) all Local Transport Authorities (LTAs) outside of London were required to enter into a formal partnership arrangement with local bus operators; entering into a formal partnership was necessary in order for the LTAs and bus operators to be eligible for any future Government funding; the partnership arrangement could either be a franchise or an Enhanced Partnership; the City Council approved the development of an Enhanced Partnership with the city's bus operators and published a Notice of Intent on 25 June 2021;

(c) the National Bus Strategy also required the City Council, as the LTA to lead the preparation of a Bus Service Improvement Plan (BSIP) for submission for the Department of Transport (DfT) by the end of October 2021; the BSIP had to set out what the partnership would deliver, in order to make buses easier cheaper and more convenient to use; the final stage in the process would be the publication of the Enhanced Partnership Plan and Scheme; this had to be achieved by 31 March 2022.

The Committee discussed the following key issues –

(d) whether the passenger numbers had improved following the ending of the Covid restrictions;

(e) raised concerns –

- on the accessibility of bus services (residents who lived on North Road West had to walk to Union Street, in order to catch a bus);

- on the ease of planning commutes and journeys; the provision of cross ticketing in the city and matching the provision of bus

services to the ferry services offered;

- at the perceived lack of pace with regard to the long target dates contained within the report and the age of the fleet in 2030;

- that whilst the investment in buses was welcomed (improved frequency and upgraded buses), this did not address either the environmental or equitable issues;

- as to whether there would be sufficient funding available, in order to improve both environmental and equitable issues within the Plan;

- whether the Council's plan would be strong enough to meet the eligible criteria (Manchester had a heavily subsidised transport scheme); it was considered that the Council needed to ask the Government for a larger subsidy for the provision of bus services in Plymouth (it was cheaper for a family of four to use a car rather than a bus and also not be restricted by a timetable);

- the length of time that bus services (on the eastern side of the city) took to travel to the hospital (Sherford to the Derriford could often take an hour) which had a direct impact on the elderly residents of the city;

- that an opportunity had been missed in reviewing the bus routes in the city, in order to improve the service;

- relating to the lack of bus service provision for commuters (such as those wishing to travel to Langage);

- at the lack of bus provision in certain areas of the city such as Plymstock to Derriford; accessibility to bus services was having an adverse impact on the elderly residents of the city who relied on this service; there was a need, going forward, to review this situation;

(f) whether consideration had been given to alternatives to the 'radial route' model currently used in the city (such as the grid model) in order to improve the bus service offer for the whole of the city;

(g) sought clarification -

- on whether there would be greater focus within the plan on the bus challenged communities of the city;

- on the percentage of buses that would either be electric or run on alternative fuels in the next five years;

- on whether the 'lapsed' bus users had been identified, in order to establish the reasons why they were not using the bus and to also encourage them to do so;

- on whether any work had been undertaken to encourage people from outside the city's boundaries to travel in by bus (such as those people commuting from Ivybridge);

- on whether an engagement exercise would be undertaken in order to increase bus usage and if so, whether Councillors could be kept updated;

- with regard to the equalities impact assessment on how the focus groups had been set up, how the data had been interrogated and collected, and how the data was disaggregated demographically; (it was of concern that the equalities impact assessment did not show any difference between the accessibility of men and women when using bus routes, as transport research had shown that there were significant differences);

- on whether there was a 'plan b' if funding was not available to purchase new buses in order to be carbon neutral by 2030, and whether Government funding would be available;

(h) whether consideration had been given to comparing bus journeys across the city, in order to help to promote the use of buses as an attractive option.

The Committee requested -

(i) that a map was made available detailing the bus routes in the city, colour-coded to identify the frequency of the services in order to compare the bus services in the city centre to those on the outskirts;

(j) that the bus user engagement reports were made available to the Committee.

The Committee agreed to –

(1) note the timescales for completion of the Plymouth Bus Service Improvement Plan 2021 and the requirement to subsequently publish an Enhanced Partnership Plan and Scheme;

(2) endorse the ambitions of the Plymouth Bus Service Improvement Plan 2021 and the aspiration to make Plymouth' buses more frequent, more reliable, easier to understand and use, better co-ordinated and cheaper;

(3) endorse the thematic proposals of the Plymouth Bus Service Improvement Plan 2021, as a comprehensive suite of measures which support the policies of the Plymouth Plan and the needs of Plymouth's current and future bus users.

The Committee requested that the Plymouth Bus Service Improvement Plan 2021 included timelines and more ambitious target dates (current target dates were two and nine years).

Note: Councillor Coker voted against the above recommendations.

17. **Economic Intelligence Update**

Councillor Nick Kelly (Leader of the Council), Amanda Ratsey (Head of Economic Enterprise and Employment), Julia Blaschke (Partnerships Manager) and Toby Hall (Economic Development Officer) presented the report together with a presentation which highlighted the following key points –

(a) the aim of this report was to provide the latest economic data and trends for Plymouth; a range of economic statistics that were of relevance to Plymouth's economy and related to the Plymouth Plan objectives of a Healthy, Growing and International city; the report detailed Plymouth's performance on these measures and its strengths and weaknesses; the report also demonstrated how the Economic Development department was addressing these issues through various projects;

(b) Plymouth's economy (GVA) had grown over the last decade; the city had seen particular growth in high value sectors, such as marine, health and life sciences and advanced manufacturing;

(c) in terms of unemployment, after an initial jump in the claimant count in March/April 2020, it had slowly decreased and the Plymouth claimant count was now below the UK average; yet while Plymouth's growth rate exceeded national trends, it had not yet closed the gap in productivity;

(d) the city was performing poorly, in terms of business density, start up and survival rates when comparing it to the South West and UK averages; Economic Development had supported growth in the city through a variety of projects; the National Marine Park would not only create jobs but would also increase the attractiveness of the city, bringing improvements to the waterfront and also support health and wellbeing;

(e) the city had been successful in bidding to become a Freeport (one of only eight across the country); this would bring up to 9000 jobs, supporting the marine sector and businesses in the city and attract new investment and new businesses to Plymouth;

(e) the city's recovery programme consisted of six different work streams and covered a plethora of actions; in addition Economic Development had worked with colleagues from across the Council to deliver the Government funded business support grants during the pandemic; over £92m was distributed to 7,440 businesses in the city, in less than 20 months;

(f) the Council would also be supporting businesses through a series of commissioned support programmes; these programmes would help to start up new businesses including social enterprises and increased entrepreneurship, support businesses to adopt new digital solutions and enable digital transformation and support business transition to net zero.

The Committee –

(g) sought clarification -

- on how the Council would support the creation of jobs in those areas on the outskirts of the city and the measures it would be taking to support businesses to become carbon neutral by 2030;

- on the measures the Council would undertaking to encourage start-up businesses, particularly on the outskirts of the city (as it was important that these businesses were not just located in the city centre);

- on whether there was any narrative as to why there had been a significant increase in part-time work in the city (was this as a result of the lack of full-time work and people having to work multiple jobs);

- on whether the scope for the marine sector could be broaden to include other elements, such as the ports, fishing, research and leisure and how the Council would support the development of this sector;

- on whether there were any unemployment statistics available for the past five years;

- on the reasons why there had been a significant decrease in the number of apprenticeships in the city in 2017 (a reduction of 50%);

(h) raised concerns -

- that the National Marine Park had only been referred to under tourism and hospitality (in the sector action plans) and requested that consideration be given to promoting the

sustainable use of the marine environment, as it would be disappointing for its potential not to be realised;

- relating to the skills shortages, in a number of sectors, where the majority of people were self-employed (such as plumbers, electricians and builders);

- that the city may need an import of high-skilled people to fulfil the high paid jobs in the city which would result in local people maintaining the low paid work (this situation would not address the Council's ambition for inclusive growth); it was important to ensure that the city's low paid economy was being skilled, in order to move from low paid work to better paid jobs and enable those people claiming Universal Credit to come off the benefit and thus become less dependent on the welfare system;

(i) whilst the focus of the creative and cultural industries was on tourism and events, there were other elements to this sector (together with some cross-over with digital creativity); however, it was considered that the Council was missing an opportunity to support jobs growth in the city for those people attending higher education (from more deprived backgrounds), in order to ensure that there were job opportunities for these people in Plymouth.

The following information would be provided to the Committee (outside of this forum) –

(j) whether the increase in growth of part-time work had reduced the opportunities of full-time work in the city;

(k) the unemployment statistics for the past five years.

The Committee agreed that -

(1) it notes the report;

(2) it takes into account the economic evidence base when considering future decisions.

(Councillor Cree left the meeting and was not present for the remainder of the meeting).

18. **Finance Monitoring July 2021**

David Northey (Head of Integrated Finance) presented the finance monitoring July 2021 which highlighted the following key points with regard to the Place Directorate –

(a) the net budget (2021/22) for the directorate was £25,069m with a forecast of £28,204m which was offset by Covid related costs of £3,093m;

(b) the directorate was reporting £0.042m pressure against revenue due to borrowing charges applied to Street Services; this had reduced since the last month;

(c) there were concerns regarding the ability to meet the Regeneration Property Fund target and the directorate continued to pursue methods of offsetting in year pressures of £0.250m;

(d) the savings target for 2021/22 for the directorate was £1.035m; 50% of the savings target had been delivered or were due to be delivered (four months in to the new financial year).

The Committee –

(e) sought clarification relating to the narrative for the savings for Weston Mill, bulky and trade waste of £208k; there was no information as to how this pressure would be relieved;

(f) requested that future finance monitoring reports included the capital programme as this Scrutiny Committee had responsibility to scrutinise this programme;

(g) raised whether the Covid off set plans were being allocated to the true cost of Covid for each directorate, or whether they were being divided up for each directorate (so the directorates were allocated nearly all of the monies they required).

A written response would be provided regarding the narrative relating to the saving target for Weston Mill, bulky and trade waste.

The Committee agreed to –

(1) note the current revenue monitoring position;

(2) request that the capital programme was included in future finance monitoring reports.

19. **Corporate Plan Performance Report Quarter One 2021/22**

Kelly Blockley (Performance Advisor) and Hannah Daw (Performance Advisor) presented the report which highlighted the following key issues –

(a) the report -

- detailed how the Council was performing against its priority performance indicators that had been agreed at the inception of the Plan; it provided an analysis of performance as at the end of June 2021, against the Council's key performance indicators (KPIs), providing a detailed performance update against the Plan's priorities;

- formed part of the Council's Delivery and Performance Framework; a key part of its aim was to achieve a 'golden thread' from the Plan and its KPIs and delivery plans, through to service and team level business plans and ultimately to individual objectives.

The Committee –

(b) sought clarification -

- on the percentage of Councillors and employees that had completed the e-learning training programme on climate change;

- on how many of the 690 poor quality affordable homes that had been demolished had been replaced in the areas referred to in the Plan;

- on whether the volunteering data included informal volunteering;

- on whether the latest performance (89.3%) on the streets graded at an acceptable level for overall street cleanliness and grounds maintenance was benchmarked by the Office for National Statistics or other sources;

- as to where the data originated from and the process for identifying the indicators that the Council wished to measure its performance against;

(c) raised concerns relating to the low percentage (33.7%) of respondents that were aware of how they could get involved in decisions in their local area;

(d) with regard to the description of key performance indicators, under the -

- 'green sustainable city that cares about the environment', there had been no reference to the marine environment or the National Marine Park which was considered to be a serious omission;

- 'vibrant economy developing quality jobs and skills', this should

include performance indicators on how growth was occurring in the city';

- 'efficient, sustainable transport network', there were no indicators relating to a highly efficient well used public transport system, or a net zero public transport system or reference to buses within the Plan (in light of the discussion regarding the Bus Improvement Plan);

(e) it would be helpful, if additional narrative could be included with the indicators, as this would assist the Committee to better understand the background issues (such as the inclusive growth earnings gap).

A discussion took place with regard to the relevance of a number of key performance indicators contained within the report, whether additional indicators needed to be included, the need for additional narrative and the need to undertake a formal review. This was considered important to enable the Committee to better scrutinise the Corporate Plan (relevant to the Committee's areas of responsibilities).

Members were encouraged to email the Chair of the Performance, Finance and Customer Focus Overview and Scrutiny Committee (Councillor Penberthy) with any issues relating to the Committee's areas of responsibility in the Plan.

Officers welcomed the feedback provided by the Committee and the importance of including the right performance indicators.

Information would be provided to the Committee (outside of this forum) relating to –

(f) the percentage of Councillors and employees that had completed the e-learning training programme on climate change;

(g) the number of quality affordable homes that had been replaced.

The Committee agreed –

(1) to note the Corporate Plan quarter one performance report and consider the implications;

(2) that through the Chair of the Performance, Finance and Customer Focus Overview and Scrutiny Committee (Councillor Penberthy), the issue of the relevance of a number of the key performance indicators would be raised at the forthcoming Scrutiny Management Board meeting in October 2021.

20. **Work Programme**

A discussion took place regarding the Committee's heavy work programme and whether specific issues could be considered as Select Committee reviews.

Councillor Coker considered that the work programme did not include the delivery of major infrastructure or the monitoring/evaluation of the South West Highways contract.

The Committee discussed its work programme for 2021/22 and agreed to include an item on adult employment in the city (including part-time, self-employed**,** low paid jobs etc) and to receive, as part of the finance monitoring report, the capital programme.

The Committee also agreed that at future meetings the Cabinet Member/Lead Officer would be asked to provide a brief overview of the issue being considered (no more than 10 minutes), as this would allow sufficient time to robustly scrutinise the issue and to also ask questions.

21. **Tracking Decisions**

The Committee noted the progress made with regard to the tracking decisions.

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Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Date of meeting:	08 December 2021
Title of Report:	BILCO Policy Brief- December
Lead Member:	Councillor Nick Kelly (Leader)
Lead Strategic Director:	Giles Perritt (Assistant Chief Executive)
Author:	Sophie Tucker (Senior Support and Research Assistant)
Contact Email:	Sophie.Tucker@plymouth.gov.uk
Your Reference:	PB 08122021
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report
To provide Brexit, Infrastructure and Legislative Change 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:
No implications for the MTFP direct resource impacts arising from the recommendations.

Carbon Footprint (Environmental) Implications:
No direct carbon/environmental impacts arising from the recommendations.

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.*

No EIA completed as no decision is being taken item is for noting and to inform the BILCO work plan.

Appendices

**Add rows as required to box below*

Ref.	Title of Appendix	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 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
		1	2	3	4	5	6	7
A	BILCO Policy Brief - December							

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 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
	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: 29/11/2021											

BILCO POLICY BRIEF- DECEMBER 2021

Brexit Office

Date of publication	Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee	GOV
Updated 24 November 2021	**Department for International Trade** Trade and investment factsheets A snapshot of the UK's trade and investment positions with individual trading and investment partners overseas. Our 3 largest partners (US, Germany and China) had the following trade in goods and services in the four quarters to the end of Q2 2021 compared to the four quarters to the end of Q2 2020: US ▪ Total UK exports amounted to £126.4 billion (a decrease of 9.9%); ▪ Total UK imports amounted to £75.2 billion (a decrease of 8.1%). Germany ▪ Total UK exports amounted to £47.2 billion (a decrease of 10.2%); ▪ Total UK imports amounted to £67.1 billion (a decrease of 0.3%). China ▪ Total UK exports amounted to £25.4 billion (a decrease of 30.0%); ▪ Total UK imports amounted to £67.6 billion (an increase of 39.5%).	Collection
Updated 23 November 2021	**Department for International Trade** UK trade agreements with non-EU countries Total trade value for each country or trading bloc updated to 2020 statistics.	Guidance
16 November 2021	**Department for International Trade** Made in the UK, Sold to the World: New strategy to boost exports to £1 trillion	Press release
15 November 2021	**Department for International Trade** Trade Secretary urges UK businesses to "Sell to the World"	Press release
11 November 2021	**Department for Transport** UK confirms pledge for zero-emission HGVs by 2040 and unveils new chargepoint design	News story
11 November 2021	**Government Office for Science** New Foresight Project launched to support UK's 2050 net zero target	News story
10 November 2021	**Department for Environment, Food & Rural Affairs** World-leading Environment Act becomes law	Press release
9 November 2021	**Ministry of Defence** £100-million investment for maritime electronic warfare capabilities	News story

9 November 2021	**Department for Levelling Up, Housing and Communities** The European Union (Withdrawal) Act and Common Frameworks: 26 March to 25 June 2021 The twelfth European Union (Withdrawal) Act and Common Frameworks statutory report detailing the progress on the development of common frameworks.	Policy paper overview
8 November 2021	**Department for Transport** Planning reforms for lorry parking	Written statement to Parliament
Updated 8 November 2021	**Department for Levelling Up, Housing and Communities** Building Safety Bill: factsheets	Guidance
3 November 2021	**Department for Levelling Up, Housing and Communities** £200 million boost to help level up communities across the UK Two Plymouth projects have been awarded over a million pounds between them in the Government's new Community Renewal Fund. Plymouth's trailblazer National Marine Park has been awarded £655,873 while the Stonehouse Union is to receive £542,893.	Press release
27 October 2021	**Department for Levelling Up, Housing and Communities** Freeports	Guidance
27 October 2021	**Department for Levelling Up, Housing and Communities** Levelling Up Fund: first round successful bidders The Woolwell to The George transport scheme has been awarded £19.9 million from the Government's Levelling Up Fund to tackle congestion and improve public transport on one of our busiest roads.	Guidance
21 October 2021	**Department for International Trade** UK calls on G7 to help build stronger and greener supply chains	Press release
21 October 2021	**Independent Chief Inspector of Borders and Immigration** Call for evidence: An inspection of the immigration system as it relates to the higher education sector	News story
20 October 2021	**Department for International Trade** UK agrees historic trade deal with New Zealand	Press release
20 October 2021	**Department for Business, Energy & Industrial Strategy** UK-led international summit sets new horizons for innovation	Press release
15 October 2021	**Home Office** Further boost for people applying for EU Settlement Scheme	News story
01 October 2021	**Home Office** Insecure ID cards phased out as travel document to strengthen UK borders	News story
01 October 2021	**Department for International Trade** Dedicated hotline and online service launched for UK exporters	Press release

30 September 2021	**Marine Management Organisation** Fishing industry in 2020 statistics published	Press release
28 September 2021	**Department for Environment, Food & Rural Affairs** UK Government announces outcome of EU fishing licence applications	News story
28 September 2021	**Department for International Trade** UK kickstarts talks to join £9 trillion global trade bloc	Press release
16 September 2021	**Cabinet Office** Government launches plans to capitalise on new Brexit freedoms	Press release

Legislation going through parliament

Government Bills and Acts

- Environment Act 2021 – **Received Royal Assent 09.11.21**
- National Insurance Contributions Bill – **2nd Reading 01.12.2021 HoL**
  A Bill to make provision in relation to national insurance contributions. The Bill deals with the following matters:
  - Introduces a new secondary Class 1 National Insurance contributions (NICs) relief for employers of Freeport employees.
  - Introduces a new secondary Class 1 NICs relief for employers of armed forces veterans.
  - Introduces an exemption for self-isolation support scheme payments from Class 2 and Class 4 NICs.
  - Widens the existing power to make regulations that impose requirements to disclose information in relation to arrangements that aim to avoid NICs.
- Professional Qualifications Bill- **2nd Reading TBC HofC**

  The Professional Qualifications Bill creates a new framework for the recognition of professional qualifications and experience gained overseas and takes steps to reform regulators' practices. It will revoke and replace the interim system for professional qualifications that derives from the UK's membership of the EU.
- Subsidy Control Bill- **Report stage TBC HofC**

  A Bill to make provision regulating the giving of subsidies out of public resources; and for connected purposes.

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Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Date of meeting:	08 December 2021
Title of Report:	**Destination Plymouth Progress report on Visitor Plan 2030**
Lead Member:	Councillor Nick Kelly (Leader)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Amanda Lumley, Executive Director, Destination Plymouth
Contact Email:	
Your Reference:	
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report
The purpose of this report is to provide a progress update to the committee on activities and key projects, which underpin the Visitor Plan 2030 strategy. The plan will use the legacy of Mayflower 400 to continue to grow the city's tourism sector using the National Marine Park as a key catalyst.

The plan 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 initially brought to Scrutiny in August 2018 with the headline Visitor Plan 2020-30 strategy being adopted by the City Council in March 2019. The final draft of the business plan was taken to scrutiny on January 15th 2020 and subsequently after being recommended to cabinet 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 along with the United Kingdom's departure from the European Union has led to significant economic shock and longer term challenges as the economy starts to recover.

2020 data showed the significant impact of Covid19 with a loss of 54% of visits down to 2,436,000 and 56% of visitor spend down to £148,436,000.

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.

It is still too early to calculate how well the sector has recovered through the early part of 2021, however early data shows that although the first half of the year was still well below 2019 levels (-£89,206,509 from Jan to May) it recovered in the later part of the year (+£12,290,061 from June to Sept). This is very positive and it is anticipated that by year-end there will have been significant recovery towards 2019 pre-Covid visitor numbers and spend in the city. This would not have been possible without significant support from the PCC grants team giving out government Covid19 grant funding to businesses and the cross-city partnership working between Destination Plymouth the two Business Improvement Districts (City Centre Company and Waterfront Partnership) to support, promote and help businesses to recover.

This report highlights the actions, which have been delivered to help the sector recover from Covid19, and how the new 2030 Visitor Plan has started to move forwards positively despite the pandemic.

Recommendations and Reasons

That the Committee:

1) Continues to support Destination Plymouth to lead delivery of the plan working with wider City stakeholders and partners.
2) Recognises the significant achievements of the Destination Plymouth, Plymouth City Council and BID teams in supporting the sector to recover post Covid19
3) Supports the sector 'asks' to government through the local MP's

Alternative options considered and rejected

Delivery of the Visitor Plan 2020 has significantly grown the city's visitor economy, which now represents nearly 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 to invest in and to live. 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.

*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.

Destination Plymouth Ltd. will require an ongoing revenue commitment of £100,000 per annum from March 2022 to remain a going concern but more importantly to enable leverage from key city partners to continue to support delivery and programme activity. Provision has been made for this commitment from within existing revenue budgets linked to the MTFS for a period of three years to March 2025.

In addition to this PCC supports city marketing and advertising within the existing Economic Development team and revenue budget and a commitment has also been made to maintain this support.

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 2025 longer term funding for DP
- DMO review impacting upon longer term funding options
- Opportunities to secure and leverage grant funding 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 work going forward will be to work 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 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 to work towards delivery of this aim by securing funding to start up a 'Green Tourism' scheme in the city from January 2022.

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.

Equality and inclusion – Successful delivery of the Visitor Plan 2030 should create up to 1000 new jobs in the sector. This will provide employment for the local community across a very broad range of roles and in a very accessible way. Destination Plymouth will review projects and activities in the Visitor Plan on an individual basis to ensure that they 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.

Appendices

**Add rows as required to box below*

Ref.	**Title of Appendix**	**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**
A	Current situation							
B	Plymouth Visitor Plan 2030							
C	Activity Plan updates							
D	Destination Plymouth Business Plan 2022/23							
E	'Du Bois' DMO review							

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 <u>unpublished</u> 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 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
	1	**2**	**3**	**4**	**5**	**6**	**7**

Sign off:

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Originating Senior Leadership Team member: Anthony Payne											
Please confirm the Strategic Director(s) has agreed the report? Yes Date agreed: 25/11/2021											
Cabinet Member approval: *Cllr. Nick Kelly* Date approved: 25/11/2021											

APPENDIX A.

1.0 Current situation

i. National Context

Tourism and hospitality is one of the UK's largest, most diverse and interconnected sectors of the UK economy, generating high levels of revenue and employment across all parts of the country. It is an economic, social and cultural asset. The sector is a major contributor to jobs and growth in the UK, indirectly employing 4 million people and making a direct economic contribution of £75 billion a year pre-pandemic.3 The sector connects people to the UK's history, showcases the UK's innovation, and has a key role to play in reviving the spirits of the nation as the country emerges from the pandemic.

The tourism sector covers inbound, outbound and domestic travel. It includes travel for both leisure – including holidays and visiting friends and relatives – and business purposes.

In 2019, the sector encompassed a diverse range of 230,000 businesses, mostly small and medium sized enterprises.

The sector covers:

• Transport businesses including: airlines, ports/terminals, rail, cruise, coach, taxi, ferries, barges and buses;

• Accommodation providers including hotels, B&Bs, self-catering, hostels, camping, caravanning, riverboats, cruises, resorts and holiday parks;

• Attractions including: indoor and outdoor events (sports, music, festivals, business events, fairs etc.), heritage, parks and gardens, theme parks, casinos, theatres, retail, food and drink, and experiences (spas, tours etc.);

• Facilitators including: Destination Management Organisations, tour operators, tour guides, travel agents, travel management companies, travel insurance, FX bureaus and tourist information centres;

• Suppliers including event organisers, security, maintenance, food and drink manufacturers, florists and English Language Schools. Inbound tourism:

The UK welcomed 41 million visitors in 2019, who spent over £28 billion, making the UK the tenth most visited country in the world and the fifth most valuable tourist destination. It is acknowledged as being one of the sectors of the UK economy most affected by the Coronavirus outbreak. UK expenditure in 2020 (GVA) dropped by 64% nationally down to £27.2 billion and is shown in the table below.

Plymouth as a comparison has been affected in the same period by a 54% drop in visitor spend with a drop in GVA of 55.5% from £259,062,000 to £115,184,000 so not as badly impacted overall. This may be potentially due to the huge amount of international traffic (over 56%) which is London based and which almost completely disappeared. Plymouth only receives 1% of international visitors so was not as badly affected by the loss of this market. We also benefitted as a region in the late summer and autumn in 2020 because of the huge surge in UK domestic visitors looking for outdoor holidays in Devon and Cornwall this was a national trend with the SW consistently being the top destination for visitors over late 2020 and into 2021.

Box 2: The impact of COVID-19 on the tourism sector in numbers

COVID-19 hit the sector hard...

Tourism-direct gross value added is estimated by Oxford Economics to have fallen by 64% between 2019 and 2020, from £75 billion to £27.2 billion and overall the fall in tourism's economic output over 2020 is estimated to have led to a 1.5% fall in UK GDP.[21]



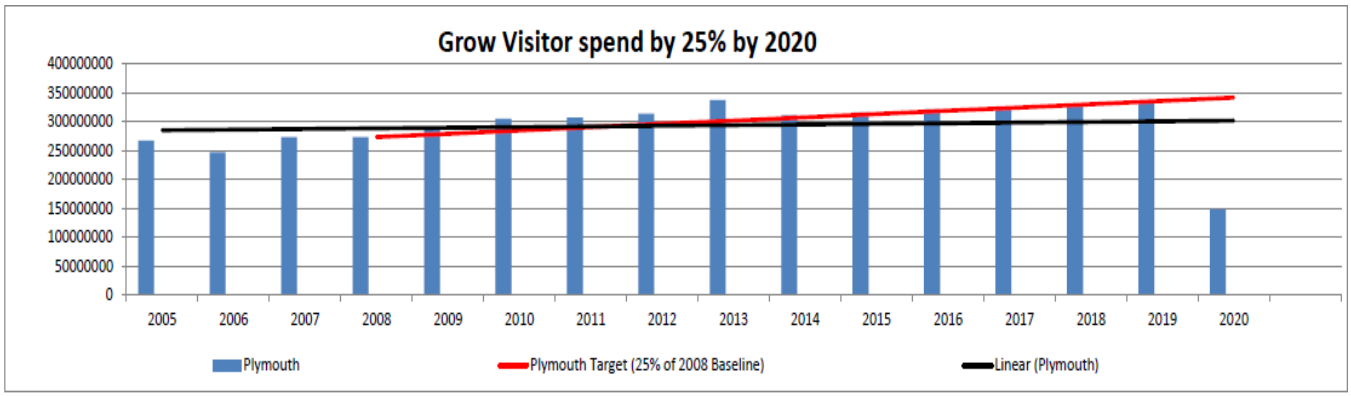
ii. Regional Context

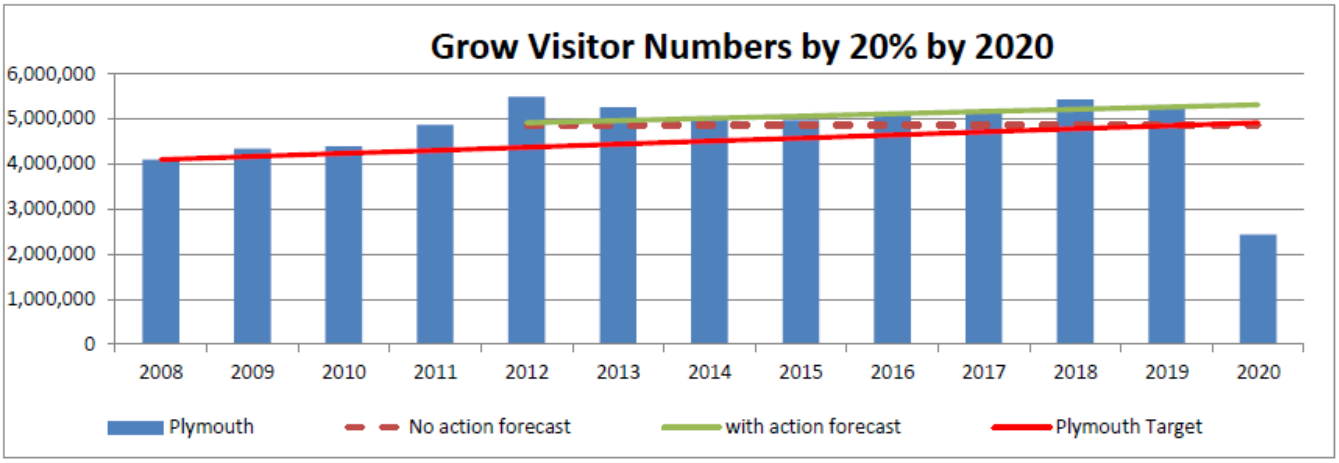
The South West visitor economy in Cornwall and IoS, Devon, Somerset and Dorset (the Great South West – GSW) is the largest single visitor region outside of London in the UK, **attracting 17 million staying visitors**, with an estimated total economic impact of **£11.3 billion**, with direct **employment of 210,000 people**.

It is estimated that in 2020 the sector lost 54% of visitor spend down from £3,181,072,000 to £1,475,671,000.

iii. Plymouth context

Visitor numbers for 2019 were very positive at 5.2 million with spend at £327 million. However, 2020 data shows the significant impact of Covid19 with a loss of 54% of visits down to 2,436,000 and 56% of visitor spend down to £148,436,000.





It is still too early to calculate how well the sector has recovered through the early part of 2021, however early data shows that although the first half of the year was still well below 2019 levels (-£89,206,509 from Jan to May) it recovered in the later part of the year (+£12,290,061 from June to Sept). This is very positive and it is anticipated that by year-end there will have been significant recovery towards 2019 spend.

There are approximately **1655 businesses** classified as visitor economy businesses **in Plymouth** of which 78% are classed as micro businesses employing under nine people. There is no doubt that the furlough scheme, grants, business rates relief and VAT reduction to 5% have played an important role in supporting these businesses to date, many would simply not have survived for this long without this support.

2.0 Approach to Covid19 impacts and recovery

In May 2020, just after the first Covid19 lockdown, Destination Plymouth prepared a first draft recovery plan and the final version was shared with the economic development team and wider stakeholders across the city in July. This recovery plan formed one of the key sector pillars in the City's overarching recovery programme. At the same time, Destination Plymouth worked closely with colleagues at the HOSWLEP and wider Great South West Tourism Partnership to write and develop a wider regional plan, which would support the rest of the Devon and Somerset region. Progress on the 'Recovery Plan' was reported back to Cabinet in December 2020.

The recovery plan was based around a simple three-phase approach:

Short term (up to 6 months – Dec 20) Acute/Research:

a) Strategic:

Lobby government to continue to provide support for sector including business rates relief and reduction in VAT.
Partnership working, further develop Plymouth, HOSWLEP and GSW recovery plans.
Bidding for DEF/VE/Recovery funding, review capital projects and prioritise

b) Business support including:

Sign posting to government grants, loans and furlough schemes, business too good to fail, account mgmt.

c) Restarting visitor sector including:

Risk assessments for re-opening, training, certification schemes, webinars etc.

d) Communications including:

Public reassurance, business information and intelligence, re-positioning the visitor offer and developing content, late summer campaign to reassure visitors (day/UK visitor target)

e) Intelligence gathering:

Online/face-to-face surveys, BDRC perception surveys, Cambridge data, implement T stats,

Mid-term (6 to 12 months – Jan 21 to Dec 21) Recover:

a) Strategic:

Partnership working to develop Tourism Zone concept, bidding process for Tourism Zone funding. Continue lobbying for extended support for businesses including VAT reduction and business rates Prioritise capital projects and assemble funding/feasibility

b) Continued business support:

Ongoing account management and signposting, possibly direct support for businesses too good to fail

c) Ongoing training and certification support:

Extension of quality/accreditation programme (consider Green Tourism Scheme), digital skills assessments/training provision

d) Communications:

Continue to reassure public, develop spring/summer marketing campaigns, re-start cruise/international activity

e) Intelligence gathering:

As above

Longer term (12 to 36 months – Dec 21 to Dec 23) Return/Restabilise:

a) Strategic: Tourism zone process overtaken by DMO review and national recovery plan. Lobby government to fund DMO review implementation. Prioritise capital projects in Visitor Plan 2030 to get up and running

b) Continued business support: as above

c) Ongoing training and certification support: as above

d) Communications: bid for more marketing funding to develop UK domestic market short term

e) Intelligence gathering: as above

To date the following has been achieved working with PCC and the wider partners:

All of the outputs in **phase 1 (acute/react phase)** including:

- Development of HOWLEP tourism recovery plan and wider Great South West Tourism Recovery Plan
- GSW regional research survey completed September 2020
- Government reduced business rates and VAT for sector businesses
- Allocation of grant funding across sector businesses by PCC during 1st and 2nd lockdown
- Successful bid for marketing funding for GSW region from government for Enjoy Summer Safely campaign £350,000

- Successful bid into Discover England Fund for 'Connections' project £158,000
- Twice weekly lobbying directly into DCMS and Visit England
- MP briefings locally, regionally and with Tourism Minster November 12th
- Successfully re-opening the sector working with multiple agencies twice after lockdowns
- Secured Sail GP, British Art show and recovered a strong events programme for 2021 to attract UK domestic and regional visitors

We are currently in **phase 2, which is the 'Recovery' phase** up to December 2021:
Key priorities, which have been delivered, include:

- Working closely with PCC and the BIDS levering £200,000 funding from the ERDF 'Welcome back fund' for the 'Geddon' campaign and marketing activity through the spring and summer 2021 and a further £100,000 for the winter/Christmas campaign in 2021 to drive day visits and repeat visits
- Leveraging in a further £50,000 from the ERDF 'Welcome back' fund for specific delivery of coach and groups, cruise and international marketing activity through 2021 to ensure we retain a presence and continue pipeline activity
- Setting up a specific portal for the hospitality, retail and tourism sector on the new 'Skills Launchpad' as a one stop point of contact for employers and employees to provide advice, jobs and training support
- Delivering a 'Get a job in tourism/hospitality' campaign over summer 2021 to address recruitment challenges in the sector
- Continuing to lobby government for ongoing financial support for the sector linked to business rates and VAT reductions
- Further research in Spring 2021 to understand business impacts in the sector
- Bidding for and securing additional marketing funding to maximise the opportunity in the UK domestic market over the next 12 months including £110,000 ARG funding to support marketing activity into the coach and groups market, maintain international activity and promote Plymouth for summer holidays and Christmas 2021
- Development of a strong marketing plan early Spring 2021 to encourage 'off peak' visits
- Re-phasing and 're-imagining' the Mayflower 400 programme to continue to have maximum impact through to summer 2021
- Bidding with PCC successfully for Community Recovery Funding to support implementation of a 'Green Tourism' scheme from January 2022.

From January 2022, we will go into **phase 3, which is the 'Return/Stabilise'** phase of the plan.

Key activities will include the following:

- Implementation of 'Green tourism' scheme - £112,000 ARG funding secured for delivery of this
- Marketing activity to boost visitor numbers in international, national, cruise, groups, trade and business tourism
- Local and regional marketing activity to boost day visitors
- Gathering research and data to better understand how businesses are recovering post Covid19 and what consumers are planning to do over the summer
- Further support for small businesses including digital skills training
- Developing grant applications for further funding to support marketing and product development
- Preparing to respond to the 'DMO review' and recommendations

3.0 Visitor Plan 2030 progress to date

In addition to supporting the recovery of the sector work has started to move forwards some of the key strategic priorities in the Visitor Plan.

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

There are a number of 'emerging' new star projects, which have been identified within the new Visitor plan linked to each of the three themes. These strategic interventions will make a 'step change' in how we deliver versus our targets and our ambitions.

Star Projects:

Currently there are nine star project concepts, which are being explored, these are set out below. See Appendix C for details of specific project updates.

Theme: Blue-green city.

Status: successful bid for £9.5 million for the National Marine Park from the National Lottery Heritage Fund's (HF) 'Horizons' fund. HF funding provides for a 2-year development phase prior to releasing funding for the 5-year delivery phase. The Plymouth NMP Horizons project is now in development stage.

i. Ocean playground – part of 'Horizons' project

   Our aims is to build on our waterfront assets by providing access all year round for activities by, on, in and under the water. Key projects include Mountbatten Watersports Centre and the Hoe Foreshore

ii. Stories of the Ocean/National Marine Park – part of 'Horizons' project

   Our national marine park will be recognised for amazing experiences. Using innovative digital technology, marine science and our local people to tell our story. Integrating culture into city centre and waterfront developments to expand the use of digital technologies to animate the city and its heritage assets

iii. National Marine Park Gateway – part of 'Horizons' 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.

Theme: Brilliant Culture and heritage

Status: all projects moving forwards and 'live'

i. 'The Box' effect – led by 'The Box'/Plymouth Culture working towards British Art Show in 2022 and wider programming for 2023 onwards.

   Build on the legacy potential of the Box by working with creative talent and communities to encourage new audiences and explore other heritage, leisure and arts activities in the city.

ii. 'Après Sea- developing Plymouth's night time economy – led by Plymouth Culture significant developments with Community Recovery Funding for 'Nudge' and Street Factory successful grant bid.

   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

iii. Celebrating our maritime and military heritage – led by National Museum of the Royal Navy (NMRN) progress positive with formal adoption of project by NMRN.

   The National Museum of the Royal Navy has recently acquired the Naval heritage Centre in Devonport situated five minutes' walk from Devonport market hall and Guildhall. This emerging cluster of potential visitor attractions has potential to be developed longer term to show case the city's marine and naval heritage

Theme: Premier destination and Ocean infrastructure

Status: Good progress is being made across all projects.

i. City conference campus and accommodation – led by PCC successful Future High Streets Fund bid has enabled the project to move forwards.

   This project will aim to realise the potential of the Civic Centre and Guildhall by developing a city centre conferencing campus to attract small and medium sized conferences, meetings and events to the city. In addition, it will support further development of supporting 4 star hotel accommodation and banqueting provision to support growth of business tourism off peak and increase staying visitor capacity.

ii. Brunel Plaza – see detailed activity plan in Appendix C for most recent update project progressing successfully

   Although work on this project to re-develop the railway station 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.

iii. Plymouth cruise and ferry port – meeting end of November with key partners to discuss funding and vision for port going forwards

This project will see improved capacity for traffic and transport, more streamlined border controls, better accessibility and visitor welcome service for cruise and ferry passengers off both the berth and tendering in. Higher volumes of ships will be achievable through a second smaller berth facility at Trinity Pier, which will also improve the access and ambience of the waterside for visitors and local residents

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.

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

Our targets are:

- To grow visitor spend by 30% from £347 million to £450 million in a decade
- To increase the total visitor numbers by 15% from 5.1 to 6.2 million by 2030

Here is the market focus for delivering that growth.

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

4.0 Significant factors affecting Destination Plymouth and Visitor Plan delivery:

i. Reduced capacity of Destination Plymouth post Mayflower 400

Destination Plymouth has levered and secured funding in excess of £7.7 million over the past four years to enable delivery of Mayflower 400 related projects and activities. Post March 2022 much of this funding will cease and therefore staff resources will need to reduce accordingly. The Senior Executive will reduce to x 1 FTE with x 1 FTE Project Management support. A business plan was taken and approved by the Destination Plymouth Board in October 2021 to demonstrate that funding was in place for the company to remain as a going concern post March 2023. Activity over the coming 12 months will be undertaken to explore and bid into grant funding opportunities to build capacity longer term in line with Visitor Plan priorities. See Appendix D.

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

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. It was hoped that the CSR review would lead to a budget allocation from the Treasury for the implementation of the DMO review recommendations, however, this has not happened. The Department of Culture, Media and Sport received a 3% uplift on its 3-year budget allocation and the sector is now lobbying strongly for some of this to be allocated towards the £51 million required to support the implementation. Members of the Scrutiny Committee are asked to lobby via our local MP's to support a recommendation to DCMS that the funding is allocated to the recommendations

The report and recommendations is attached as a further appendix E.

iii. 'The Great South West Tourism Partnership'

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

This partnership has existed informally in different forms for many years delivering value to the region. During the COVID-19 crisis, the GSWTP group has come together like never before to the benefit of the tourism and the visitor economy, including providing business support to the individual businesses, co-ordinated regional marketing campaigns, collaborative impact surveys and joint lobbying to Government for industry support. The GSWTP is not a formally constituted organisation and is formed of organisations from a range of backgrounds including, commercial, not for profit business, Local authority and Business Improvement Districts. This group recognises the strength and value of focusing on our common goals, aspirations and vision for the region and is the first step in building a

stronger, more productive, resilient and valuable Tourism and hospitality network for the Great South West region. It was cited as an example of collaborative best practice in the recent 'Du Bois' DMO review report.

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 if 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. The table below shows the current vacancy rates across the city, which have now reduced slightly due to going into 'off peak'.

PLYMOUTH	July 21	August 21	September 21	October 21
Total Job Vacancy Postings	2072	2557	2076	2325
Tourism, Hospitality & Retail Job Vacancy Postings	138	222	180	149
Tourism, Hospitality & Retail as a % of total	6.7%	8.7%	8.7%	6.4%

It is fair to say that this is not just a Plymouth problem it is a national issue with a recent Office of National Statistics report stating that between 23 August and 5 September 2021, 30% of hospitality businesses said that vacancies were more difficult to fill than normal. This compares with 13% across all industries (up from 9% in early August).

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
- Brexit reducing the number of international workers in the city
- Perception of the sector as low paid and unsociable hours
- High volume of demand due to very busy post Covid period over summer

In the short term, funding from the ERDF 'Welcome back' fund was used to deliver campaign over summer aimed at young people and semi-retired people to encourage them to work in the sector. Although the campaign achieved a high reach, the engagement was relatively low. More work needs to be done longer term to change perceptions of the sector and encourage people in at an early stage. The Employment and Skills team at PCC have been exploring the challenges further along with a sector based task group and will develop a longer-term plan over the coming 12 months to try to address the issues.

v. Asks to Government

In order to support some of the key aims for the region and the partners the Great South West Partnership representatives are continuously asking for support from the government. These 'asks' are put forward to local regional MP's as well as the Great South West APPG via Chair, Sir Gary Streeter,

MP, the Tourism and Hospitality APPG via Chair, Simon Jupp MP and Tourism Minister Nigel Huddleston MP.

Current 'asks' are as follows:

1. Maintain the 12.5% VAT reduction rate indefinitely to boost competitiveness internationally and encourage consumer spend in the sector

2. The Government via DCMS to fund the implementation of the recommendations in the 'Du Bois' DMO review report.

3. Offer funding for DMO's though new opportunities post CSR for example 'shared prosperity' or 'levelling up' funds to support development of Great South West Tourism Partnership and local DMO action plans to help sector recovery and longer term growth

Destination Plymouth is now asking Plymouth City Council to support these 'asks' to government and to acknowledge the work that Destination Plymouth in partnership is doing to help the sector towards recovery over the next three to five years.



Department for
Digital, Culture,
Media & Sport

The de Bois Review: an independent review of Destination Management Organisations in England

Nick de Bois

August 2021

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Foreword by Nick de Bois



England has an outstanding tourism offer. Extraordinary, beautiful landscapes, some of the world's most renowned historic monuments, buildings and places, stunning stretches of coastline and inland waterways plus of course our dynamic bustling cities and towns. We can rightly boast some of the finest museums in the world, the most historic universities and an eclectic choice of tourist attractions and events right across the nation.

It is no wonder that England is such a popular destination – attracting 99 million domestic overnight visitors a year before the pandemic, with London the third most visited city on the planet and 41 million visitors coming to the UK in 2019. These numbers translate into a huge number of jobs – there are 4 million jobs across the UK directly or indirectly dependent on tourism – not to mention lasting memories and great experiences.

None of these figures mean we should rest on our laurels, however, because they disguise an untapped potential which I will come on to explain. Furthermore, we all know that it has been quite a different story over the last 18 months with tourism one of the hardest hit of all economic sectors by the pandemic. The sector now has a long road to recovery ahead and this recovery will depend, in part, on the prevailing pandemic conditions but also on having the right structures and partnerships in place to drive that recovery forward.

'A good DMO is the glue which brings together the huge array of parties together in an area that make up its visitor economy'

It is those structures that this review set out to examine – with a focus on Destination Management Organisations, or 'DMOs' for short.

About DMOs

Let's face it, most people outside the tourism sector have no idea what a DMO is or what they do.

It is perhaps best to think of DMOs as local or regional tourist boards built around a visitor destination such as a town, city or county. That destination usually gets built into their name – Visit X, or Marketing Y. When you are planning a trip and looking for things to do, it is usually the DMO's website that you turn to, whether you know they are a DMO or not. When you see an advert on your Twitter feed, on the underground or in the paper telling you to visit such and such county or city, it is usually a DMO that produced it.

Yet when a DMO is performing at its best, it is not just doing marketing and promotion. It is undertaking a wide range of effective activities that combine to ensure their destination remains sustainable, competitive and compelling. This will include marketing, but also activities such as providing advice to businesses on new regulations, skills programmes or grant funding opportunities, going after inward investment, creating new travel itineraries and products in conjunction with transport companies or bringing together players to create a compelling bid package for a major event. A good

DMO is the glue which brings together the huge array of parties together in an area that make up its visitor economy.

DMOs are found in almost every nation and region the world over. Why? Because they respond to a market failure. Tourism businesses want DMOs because they understand that the tourism sector is an ecosystem and that the success of each individual business is intrinsically linked to the success of the destination as a whole. That's why they pool resources to fund a DMO. Consumers don't travel to the Lake District just to stay in a hotel – they come for its brilliant food offer, the amazing landscape and the heritage as well – and they are not going to come back if the food is bad, the landscapes poorly maintained or the attractions boring. Nor are they going to go at all if they've never heard of the Lake District. It is a DMO type organisation that is best placed to stitch the destination together, keep it competitive and present it to the world.

'It is a DMO type organisation that is best placed to stitch the destination together, keep it competitive and present it to the world'

In England, however, our DMOs are not structured, funded or supported in a way that allows them to maximise their potential. There are some exceptions to this, but when looked at together they are performing sub-optimally. If this continues it will mean slower recovery, slower growth and unfulfilled potential.

About the review

This review was commissioned by the DCMS Secretary of State and the Tourism Minister in March 2021. I was instructed to think comprehensively and boldly about the recovery and future of the visitor economy and the role of DMOs within that.

Leading this review has been an honour because everyone I've engaged with has been so passionate, committed and informed, and I have spoken to a huge and diverse range of people over the last five months. It was important for me to engage widely, because I wanted to get a full appraisal of the actions, impact, strengths, weaknesses and potential of England's DMOs. That meant speaking with attractions, National Landscapes, Local Authorities, representatives from our historic buildings, coastal towns, consumer and business event organisers, small businesses and large corporations, to name a few, and of course DMOs themselves.

'There is fragmentation across the landscape, as well as geographical overlap, duplication, distorted priorities and competition when there should be alignment.'

What were the key messages?

First, everyone recognised the need for DMOs. They are a crucial part of the tourism ecosystem and are not going away. Many English DMOs do great work, and add a lot of value, but this is not consistent across the board and is despite the Government, not because of it.

Second, the current landscape in England is a complicated patchwork quilt, with each DMO managed and led in different ways. They can be limited companies, a team in a Local Authority, a Business Investment District, or a Community Interest Company. Their funding models are also diverse and often opaque – some entirely private, some entirely public, some a mix of the two. There is fragmentation across the landscape, as well as geographical overlap, duplication, distorted priorities and competition when there should be alignment. Whilst a bit of variation is fine, the unstructured nature of the landscape is ultimately hard to get your head around. There was an overriding call throughout the review and from all parties for a degree of coherence. Everyone wanted a simplified structure with clear channels of communication between DMOs and national Government, a clear definition as to what a DMO is and what it should do and a common understanding of expectations, roles and priorities.

Third, funding is a big problem. The pandemic has led to a huge drop in commercial revenues, but this comes against the backdrop of a decade of funding being withdrawn by the public sector starting in 2012 when the government somewhat brutally cut loose DMOs from core grant funding via the old Regional Development Agencies. The DMO response was resourceful and they looked elsewhere for money by becoming more commercially minded and reliant on private sector membership. In some senses this is a good thing, but it has also meant DMOs focusing inwards on the marketing desires of their members and has led to a huge amount of time spent constantly chasing for money.

The funding situation also means England's DMOs are not really in a position to support the Government to deliver its tourism policies or to carry out the full suite of activities needed to keep a destination sustainable and competitive. It has become somewhat like an elasticated bungee run – with the resources they have DMOs can get so far but never quite to the end of the run because they always pinged back to marketing. Place-shaping, having a seat at the table on investment decisions, supporting bids for major events, developing a destination strategy – all vital elements of destination development – are just out of reach. I contend that with some core government support we can help strategic, well led DMOs complete the "run" and dramatically improve the growth of regional tourism as a result.

'There was an overriding call throughout the review and from all parties for a degree of coherence'

Fourth, England's DMOs do not regularly have a seat at the table when it comes to decisions by key place-shaping decision-making bodies. Their voice is often unheard and unrepresented because of the fragmented and confusing structures, and the distorted priorities of DMOs themselves.

There were more findings too, and there is a lot of nuance to explore and understand, but these were the key points for me. My report sets out 12 recommendations for improving the DMO landscape in England.

The way forward

The key recommendations are for the Government. Currently the Government is sitting on its hands when it needs to get stuck in. England is relatively unique in how 'hands-off' the Government is with destination management at a subnational level. International best practice points towards a top tier network of DMOs operating at regional scale, built around destinations that make sense to the consumer and in receipt of reliable funding from the Government to serve as a foundation or springboard from which the world is then their oyster.

'Funding is a big problem and it means England's DMOs are not in a position to support the Government to deliver its tourism priorities'

That's why I have proposed a new simplified tiering structure, which would create a national portfolio of high performing DMOs, able to receive core funding from the central Government if certain criteria are met. These DMOs would then be accountable for what they deliver. I am acutely conscious that by asking for government support from the taxpayer, there must be a return on investment and stringent accountability for how it is spent. In return I am asking the government to give DMOs the tools to do the job they are best placed to do.

This need not cost the Government much in the grand scheme of things. I would estimate it costing somewhere in the region of £15m to £20m per year, based on my conversations with DMOs during the review. The Government is set to spend many multiples of this on tourism infrastructure through the £4.8bn Levelling Up Fund (not to mention the Towns Fund and the Getting Building Fund), so my proposals are not even 0.1% of that Levelling Up Fund cost. Yet the benefits could be substantial. Just a 1% increase in the value of tourism above its pre-COVID contribution would be worth

£745m to the economy each year and a super-charged DMO network operating on firm foundations is more than capable of that.

I am acutely aware that government intervention done badly can do more harm than good. Unintentionally, changes could exacerbate existing issues, or create new ones, if mis-handled. It is absolutely vital that the diversity and breadth of England's offer is recognised as a fundamental strength and, just as is the case with the Government's thinking on levelling up, imposing a uniform one-size-fits-all solution that treats every destination as having the same needs would be a catastrophic mistake. Of equal importance is that changes must not be looked at through the eyes of Whitehall or the Town Hall. The consumer should come first.

'Imposing a uniform one-size-fits-all solution that treats every destination as having the same needs would be a catastrophic mistake'

The challenge for DMOs is to accept the urgent need for coherence to their operating landscape and embrace a rationalised structure where there has been none before, and accreditation where none exists. My review takes a long hard look at what is expected from our DMOs and inevitably this will involve change. For some that may be uncomfortable, but not to collaborate or join together will mean potential unfulfilled.

The opportunity at stake

This review comes at a time when the Prime Minister has challenged all of us to propose ideas and solutions to level up opportunity and prosperity in every part of the country. His recent Levelling Up speech on the 15th July[1] could have been written with the tourism sector and this review in mind, when he said: "There is no place in the country that does not have something special, some selling point" and when he made the point that "all they need is the right people to believe in them to lead them and to invest in them and for government to get behind them". My recommendations do precisely that. The tourism industry is ready to take up the challenge. Most of the building blocks are already in place – fantastic committed local leadership with a passion for their destination, strong 'attack brands' and a compelling visitor offer across England, and an array of DMOs who have shown good promise with respect to working in partnership with public, private and community interests in their destination as well as with each other. What's missing is a coherent, sustainable, robust and accountable structure that can give DMOs time, space and a clear direction, and the ability to perform consistently from a firm foundation.

'It's time for the Government to put in place a super-charged DMO network capable of unleashing the potential of England's many powerful attack brands'

For me, potential unfilled is the story of English tourism over the last decade with the Government frankly operating on the lazy assumption that tourism can look after itself and is doing just fine. The pandemic has certainly played its part in exposing this assumption, and I am glad to see the recently published Tourism Recovery Plan set out bold targets and a clear framework for a swift recovery. However, it's now time for the Government to put its money where its mouth is, and put in place a super-charged DMO network capable of unleashing the potential of England's many powerful attack brands.

Furthermore, it's time for the Government to realise the potential of this sector. Doubling visitor numbers in England between 2010 and 2020 might seem good but frankly we could have exceeded that in both quality of spend and quantity of visitors. Over that period our tourism sector grew slower than the world average and we lost market share. With all that England has to offer it should not be acceptable to see France continue getting double the number of international visitors, and for the UK to have only one city in the top 100 most visited global cities.

[1] https://www.gov.uk/government/speeches/the-prime-ministers-levelling-up-speech-15-july-2021

'If the Government is fine with England staying in Tourism's equivalent of League 1, with a declining market share and unfulfilled potential then it should do nothing and continue leaving DMOs largely to their own devices'

The Prime Minister has said levelling-up is about 'heating up' all our regions so they are performing at their potential. DMOs are ideally placed to achieve this for tourism, and there is huge scope for growth. If we can get structural reform right there is huge potential for this sector to become more productive and play its full role in placemaking and economic regeneration.

And it is not just England which will benefit. Although Tourism is a devolved responsibility, a stronger English landscape will be a good thing for tourism businesses and organisations in Wales and Scotland keen to work on cross-border collaboration. There would also be Barnett consequentials from increased investment in England.

If the Government is fine with England staying in Tourism's equivalent of League 1, with a declining market share and unfulfilled potential then it should do nothing and continue leaving DMOs largely to their own devices.

But if it wants to level this sector up to the Premier League, then it is time to abandon the last decade of a "hands off' approach to tourism. Now is the time to introduce a new era of policy engagement and delivery, working with the successful public private partnership that our DMOs can be, charging them with the strategic role our cities, regions and counties require to deliver the growth and levelling up government seeks.

Nick de Bois
August 2021

Executive Summary and Recommendations

What I was asked to do

1. In March, I was asked by the Secretary of State for Digital, Culture, Media and Sport, Oliver Dowden, and the Minister for Sport and Tourism, Nigel Huddleston, to conduct a root and branch review of the Destination Management Organisation (DMO) landscape in England.

2. My terms of reference were clear. First, build up a picture of the current landscape, and set that in an historical and international context. Second, appraise the landscape, in particular work out the extent to which it is economically efficient, effective and sustainable, assess whether or not it is maximising its potential to support delivery of the Government's tourism policy agenda with respect to England and assess if it is sufficiently integrated with the wider local and regional economic landscape (i.e. Local Authorities, Local Enterprise Partnerships and so forth). Third, make recommendations to fix any deficiencies I found.

3. As for why I was asked to undertake the review, I think that was also clear. **For many years, DMOs had been raising concerns with the Government about their financial stability and almost every player in the tourism sector had been crying out for a rationalisation of the landscape.** The COVID-19 pandemic only made the case for a review more urgent, with the knock-on impact of pandemic restrictions causing massive reductions to DMO commercial revenue streams at the very time tourism businesses needed their support most.

4. **In my first meeting with him, the Tourism Minister explained that now was the time – with recovery on the horizon and the sector hit harder than ever before in its history – to think comprehensively and boldly about the future of the visitor economy and the role of DMOs within that.**

How I conducted the review

5. Given the immediate challenges presented to the tourism sector by COVID-19, the timeframe given to me was short – five months – but within that timeframe I sought to engage as wide and diverse a set of stakeholders as possible within the constraints imposed by the ongoing pandemic. I've met with many, both in virtual one-to-one meetings and through in-person roundtables up and down the country. I've also conducted what I believe to be the largest, most detailed survey of DMOs ever undertaken in England and a written consultation, open to anyone, which received 340 substantive responses.

6. As a result, I was able to work from a comprehensive evidence base. To assist me in making sense of it, and to act as a sounding board for developing recommendations, I set up a Challenge Panel of experts from across the tourism sector and beyond. I am grateful for their assistance throughout the review process and have provided further detail on Challenge Panel membership in the Annexes.

A note on terminology

7. **It became apparent to me almost straight away that the acronym 'DMO' means different things to different people.** The key distinction is what the 'M' stands for, with some saying 'Management' and some 'Marketing.' Not every DMO is a Destination 'Management' Organisation, despite what it

might have said in my Terms of Reference and despite the overall name of the review. As such, I sought to look at the structure and funding of tourism at a regional and local level in the round rather than be constrained by a focus on 'Management'. When I use the acronym 'DMO' in this report, I use it to mean both Management and Marketing, i.e. to cover all types of DMO or organisations engaging in DMO type activities. When I want to refer specifically to 'Management' or 'Marketing', i.e. when exploring the differences between the two, I deliberately spell out the acronym using the appropriate word.

My findings

8. First and foremost – I found that DMOs are here to stay. They are found in every region and destination in the world with a developed tourism industry, and with good reason. **They respond to a *well documented* market failure.** Tourism businesses want them, because they understand fundamentally that tourism is an ecosystem and that their own business success is intrinsically linked to the success of the destination as a whole. They also understand that a DMO type organisation is best placed to manage and grow the destination, ensuring it remains competitive and sustainable. The question of whether or not they should exist is ultimately moot. **The key questions are therefore – what does a high-performing DMO deliver, under what conditions does that arise and what is the role of the Government in creating and maintaining those conditions?**

9. **For me, a high performing DMO should do the following. It:**

- Is actively involved in destination management, not just marketing.
- Is built around the consumer rather than administrative boundaries set by the Government (although it is helpful when these align).
- Covers a geographic area with a tourism offer that comes together as a compelling and competitive brand.
- Has a clear strategic, long-term vision for how to develop the destination in line with its key strengths, so it remains competitive and sustainable.
- Acts as the 'broker' and/or 'convener' for the tourism sector in the area covered. DMOs should be true partnerships between public, private and community organisations.
- Is a strong and trusted advocate for the tourism sector, bringing relevant stakeholders with them, with a seat at the table when it comes to major decisions about transport, inward investment and so forth, and able to marshal evidence to illustrate the situation on the ground and the impact of visitor spending.
- Should be well integrated with the country's overall tourism strategy, and have the capacity to deliver grant-funding projects on behalf of central Government if required;
- Should be outcome-focused and financially sustainable, not continually fighting for survival or serving as a vehicle to boost individual egos.
- Undertakes activities that match the development needs of their destination, ensuring it remains sustainable and competitive. This will vary from DMO to DMO and, yes, it almost always involves marketing but that is not the be all and end all. Getting visitors to a destination is just one aspect of developing a competitive and sustainable visitor economy.

10. When DMOs are performing consistently at this level it adds a significant amount that no one other body is able to provide. Consumers will know the destination exists, that it presents a compelling and cohesive offer and they will be more likely to have a great experience when they visit. If they don't, the destination will be able to collect evidence to know about it and implement a fix. Tourism businesses will have skilled staff capable of serving consumer needs and will have up to date evidence on how they need to innovate and adapt to ensure the destination remains competitive. Investors will be more inclined to look at the destination as an opportunity and the local community will embrace the opportunities presented by the visitor pound. More visitors come, they will be incentivised to stay longer and spend more, more jobs are created and prosperity flows.

11. **Local Authorities cannot achieve all this, with their artificial boundaries that make little sense to the consumer and their poor connections with tourism businesses.** Local Enterprise Partnerships can't either, as they lack policy levers to affect change and again, don't match up well with consumer understanding. Businesses alone can't do it either – why would they go solo in promoting their destination when their rivals might stand to benefit? **It is a DMO type organisation that is needed to stitch it all together.**

12. Yet did I find that DMOs across England were all consistently performing at the optimal standard? Unfortunately not, although there were plenty of examples of good practice and some DMOs are certainly closer than others to excelling.

13. There's a lot that England's DMOs do well. They are staffed by passionate and well informed staff, who are able to articulate what makes their destination special. They are often able to act as conduits of information from businesses to the public sector and vice versa. Many regularly and competently administer grant funding on behalf of the public sector – £500,000 over the last three years on average per DMO.[2] Lots have the trust of the private sector, and there is no better evidence of that than their continued existence over the last decade despite the withdrawal of funding from public sector sources. Much of the evidence I collected pointed to the best Destination Management Organisations acting as the 'glue' bringing together the vast range of parties that collectively have a stake in the visitor economy.

14. **Despite this, the current DMO landscape in England is ultimately sub-optimal and for a number of fundamental, structural reasons is held back from achieving its full potential.** No-one would have designed what we have now. The following are particular issues:

- **Variation:** There is too much of it – in terms of structure, geography, size, model and performance – to the point where the landscape appears incoherent to those from the outside looking in. For example, there's at least 46 DMOs in the South East, of all shapes and sizes, from 'Tourism South East' down to 'Destination Basingstoke'. **This variation creates confusion among policy makers at all levels of Government, and amongst businesses and consumers, ultimately causing them not to engage with DMOs.** Furthermore, the inconsistency makes it difficult for the Government to look at the DMO network as a natural and reliable delivery partner, especially if it wants to deliver on a consistent basis across the country.
- **Fragmentation:** There is an excessive amount of geographical overlap and territorial competition, leading to missed opportunities around economies of scale. For example, why does Devon have a Visit Devon, a Visit Dartmoor, a Visit Exmoor, a Visit South Devon, a Visit Totnes, Destination Plymouth as well as Exeter City Council getting involved? **There are too many DMOs, to be frank, and not enough doing destination management.** No mechanism exists for bringing the fragments together, sharing best practice or evaluating performance consistently. The fragmentation leads to a diminished voice for the visitor economy overall and exacerbates low awareness internationally of all the brilliant tourism offerings across England.
- **Funding:** Reliable Government funding has all but evaporated over the last decade – Local Authorities spent £127m less on tourism in 2017-18 than in 2009-10. Whilst this has forced DMOs to become more commercially savvy organisations (a good thing in the main) it has also meant that DMO staff spend too much of their time chasing membership income (some have half their staff devoted to it!) and not delivering the full suite of strategic activities that make for good destination management. Over-reliance on membership fees also acts to skew priorities to destination marketing, reducing time and focus on longer term revenue raising activities and place building. **Core funding would give DMOs the breathing space and firm foundation they need to support a strategic agenda and lean-in to the Government's tourism priorities, and I do not think the Government can expect high potential DMOs to consistently and substantively support them without it.**

[2] This figure is the median average, rather than the mean average, as a small number of DMOs administer much higher amounts. The median is therefore a better measure of central tendency in this instance.

- **Evidence:** There was a lot of evidence put forward about the specific value that a DMO can bring. Clearly they add value, otherwise an estimated 50,000 tourism businesses would not pay them membership fees, but the evidence provided was not consistent across DMOs and tended towards the anecdotal rather than the robust. There's no national framework to compare performance between DMOs and **on the whole tourism data is weak**.
- **Engagement:** Some DMOs are able to act as the 'broker', 'convenor' and 'advocate' for the visitor economy in their area, and are well engaged with all their key strategic partners. I've included the example of Experience Oxfordshire in the report, which helped over 10,000 businesses during the pandemic. However, this is by no means consistent across the country.
- **Relationship with local and national Government. Many contributors to the review felt that they were not part of a national tourism strategy, or a coherent structure with clear, distinct roles for national Government, VisitEngland and DMOs.** VisitEngland, though praised for their work during the pandemic, was criticised for being disengaged and not fulfilling a leadership role. **Many Local Enterprise Partnerships and Local Authorities, in particular, appear to ignore or downplay the economic value of the visitor economy** and are not as sufficiently engaged as they could be with their DMO.

15. **I therefore concluded that the current landscape is not economically efficient, effective or sustainable. It is not configured in such a way that best enables the Government to deliver its priorities as set out in its Tourism Recovery Plan and more could be done to integrate DMOs with the wider economic landscape.**

16. **If the Government wants to 'level up' DMOs and ensure they are fully equipped to be at their best, then fundamental change is needed, not tinkering around the edges.** Coherence must be brought to the landscape, and my recommendations set out a new tiering system to do that. The foundations also need firming up, which is why Ministers must be prepared to provide funding to top tier Destination Management Organisations best placed to support the growth of regional tourism. At the moment, England is an international outlier in relation to how 'hands-off' the Government is. DMOs themselves must also embrace change and if they are not prepared to be held to account, to move away from an over-focus on marketing or to collaborate, then they cannot expect funding. If the changes I propose are implemented, then English Tourism will acquire a strong network of DMOs able to support delivery of the Tourism Recovery Plan, leading on key national priorities such as securing more higher-spending visitors in every region, sustainability, inclusivity, extending the tourism season and place-shaping.

17. However, if the Government decides to play a greater role, it must be careful. It is certainly conceivable that Government intervention could exacerbate existing issues , or create new ones, if mis-handled. In particular, it must appreciate that the diversity and breadth of England's tourism offer is a fundamental strength and not impose a uniform one-size-fits-all solution that treats every destination as having the same needs. **It must also appreciate that in the tourism world, the consumer should come first. No attempt should be made to fit DMOs neatly into existing administrative structures** – be they Local Authorities, Local Enterprise Partnerships or something else – this would ultimately lead to destinations not fulfilling their potential.[3] Finally, if the Government decides to provide funding it must hold DMOs to account for delivery. My recommendations are designed with these considerations in mind, and I have summarised all twelve on the following pages.

18. This report will now need to be considered by the Secretary of State for Digital, Culture, Media and Sport, as well as the Minister for Tourism. It is in their gift to decide whether or not to implement the recommendations that I have set out for the Government.

[3] It is helpful when these align, however, as is the case in some locations like London and Manchester. Potential 'county deals' may help alignment further as counties are a more natural fit with the consumer.

My recommendations for Government

Recommendation 1: The Government should bring coherence to England's DMO landscape via a tiering approach, using an accreditation process to create a national portfolio of high performing Destination Management Organisations that meet certain criteria. I would also suggest a move away from the confusing 'DMO' term and call these nationally accredited Tourist Boards.

Recommendation 2a: The national portfolio should then be split into two tiers – a top tier of accredited Tourist Boards acting as 'Destination Development Partnerships' or as leaders of them, (these could be described as 'hubs') and a second tier of accredited Tourist Boards acting as members of these Partnerships ('spokes').

Destination Development Partnership status could be awarded to either an individual accredited Tourist Board covering a large enough geography (e.g. a city region) or to a coalition of willing accredited Tourist Boards within an area that come together under a lead Board.

Recommendation 2b: The Government should then provide core funding to each Destination Development Partnership. The funding should be focused on activities that ensure their destination remains sustainable, competitive and responsive to high level strategic challenges identified by the Government such as those around sustainability, skills, inclusive tourism and levelling up. The Destination Development Partnership would be expected to pass down a degree of funding to accredited Tourist Boards amongst its coalition and work collaboratively with them to deliver a shared vision.

Recommendation 3: DMOs that do not meet the national accreditation criteria should be automatically considered as part of a 'third tier'. These are likely to be small, localised Destination Marketing Organisations and the Government should minimise its engagement with them.

Recommendation 4: As it is England's National Tourist Board, with the statutory responsibility for growing tourism at an England level, the Government should charge VisitEngland with responsibility for creating, maintaining and supporting this new tiered structure. It should receive sufficient funding and resources to do this.

Recommendation 5: The Government must also change its approach, in order to maximise the success of the new system. There is currently insufficient appreciation of the importance and promise of the visitor economy at the top of government, leading to unfilled potential in DMOs and the wider tourism landscape. In practice, responsibility for tourism policy cuts across multiple departments, creating a confusing picture. Practical measures to address these issues could include elevating the Tourism Minister to a Minister of State position and either reallocating responsibilities from other departments to sit under that Minister or making the Minister responsible for the activities of teams within multiple departments – this latter suggestion is an established practice already in other policy areas which cut across Whitehall departments.

Recommendation 6: In order to help DMOs and Local Authorities take decisions on how best to develop the visitor economy in their local area, the Government should improve access to quality data by introducing the proposed Tourism Data Hub as a matter of urgency.

Who does what? The structure of English Tourism if the recommendations are implemented:

National Government

- Sets England's tourism strategy.
- Government responsible for a wide range of policy levers affecting performance of the tourism industry – e.g. tax policy, labour market policy and visa and border policy.
- Funds the National Tourist Board, trading as VisitBritain and VisitEngland, to promote and develop England's tourism industry, e.g. international marketing, business support, quality assessment and data collection.
- VisitEngland gains responsibility for running an accreditation system that creates a National Portfolio of Tourist Boards (formerly DMOs). They would also be responsible for working with the Destination Development Partnerships to collectively deliver England's tourism strategy.

Regional Tier – Destination Development Partnerships

- Either individual accredited Tourist Boards from within the National Portfolio that cover a large enough geography (e.g. a city region), or a group of them acting in coalition under a lead Tourist Board.
- Able to receive multi-year core funding from the national Government, via VisitEngland.
- Responsible for a Destination Development Plan which sets regional priorities for the visitor economy in the geography covered, in-line with England's tourism strategy.
- Focused on strategic objectives – e.g. skills, sustainability, levelling-up, inward investment, productivity and accessibility.
- Main conduit of information between Government and tourism sector. Undertake data collection.
- Expert source of advice on tourism investment, infrastructure and on bids for Government funding.
- Expert source of advice on major events – e.g. acting as convention bureaus.
- Lead on tourism product development – e.g. integrated transport passes or travel itineraries.
- International travel trade engagement.
- Well integrated with key regional actors – e.g. county councils, Local Enterprise Partnerships, Mayoral Combined Authorities.
- Undertake back office functions for accredited Tourist Boards within the region.

Intermediate Tier – Accredited Tourist Boards

- Members of Destination Development Partnerships and able to receive downstream funding from them.
- Work in collaboration with Partnership on its Destination Development Plan. Able to articulate local tourism development needs and ensure they are incorporated into the overall Plan.
- Focused on marketing, tourism promotion and information provision activities.
- Capable of collecting evidence/data on the tourism situation 'on the ground'.
- Well integrated with key regional actors – e.g. district councils, LEPs.
- Day to day business support, development, engagement and account management.

Local Tier – Local Marketing Organisations

- Unaccredited and unaffiliated with any Destination Development Partnership.
- Unable to receive funding from the central Government.
- Almost entirely focused on marketing and promotion.

My recommendations for DMOs

Recommendation 7: DMOs must accept that they also have a role to play in driving forward change; it cannot just be left to the Government. To maximise the success of the new structure I have outlined, DMOs will need to take a less territorial approach, have a greater focus on collaboration, and recognise that the current fragmentation is holding them back from acting as effective advocates for the visitor economy.

Recommendation 8: DMOs should seek to diversify their income streams, and should share and learn from examples of best practice. This will enable them to best leverage the core funding I propose and I would expect a commitment to diversification as being an accreditation criterion.

Recommendation 9: DMOs should have a rigorous focus on keeping the skill sets and expertise of their own staff up-to-date, particularly with respect to digital skills, so as to ensure their destination's offer continues to be sustainable and competitive.

Recommendation 10: DMOs should have more diverse boards that fully represent their communities as well as their businesses and visitors.

My recommendations for Local Enterprise Partnerships and Local Authorities

Recommendation 11: Local Enterprise Partnerships must realise the value of tourism, ensure the visitor economy is fully integrated into their economic strategies and play their full role as partners in the activities of their local accredited Tourist Boards and Destination Development Partnerships. They should recognise that DMO type organisations are best placed to drive growth in regional tourism and they should actively support them.

Recommendation 12: Local government – be that a District Council, County Council, Mayoral Combined Authority or any other formulation – must also realise the value of tourism and should strive to play their part in supporting accredited Tourist Board and Destination Development Partnerships. They should accept that for DMOs to be at their best, they need to be public/private/community partnerships, not based solely in a Local Authority but working in partnership with them. They should also involve their DMO in any policy decision-making affecting the visitor economy.

Introduction

1. **Tourism is an important component of the UK's economy.** It creates wealth and jobs, broadens minds, supports wellbeing, drives investment and sustains the protection of our natural, cultural and historic heritage. In 2019, tourism directly (i.e. as a result of visitor spending) supported around 4% of the UK economy (£75bn) and 1.7 million jobs.[4] For perspective, the UK automotive sector employed 390,000 pre-COVID and the aerospace sector employed 120,000 – so tourism directly employs more than double both sectors combined.[5] The indirect benefits of tourism are greater still, with the visitor pound indirectly supporting up to 4 million jobs[6] in total across the UK, including the florist producing flowers for an event venue, the plumbers and electricians servicing local hotels, and the farmer providing produce for a restaurant chain.

2. **The tourism ecosystem is diverse and complicated.** In 2019 there were over 230,000 businesses operating in the sector across the UK[7] – 98% of them small and medium sized enterprises[8] – including transport providers, accommodation providers, attractions and tourism 'facilitators' such as tour operators, tour guides, travel agents, travel insurance companies, those working in the meetings, incentive travel, conferences and exhibitions sub-sector and, of course, DMOs. England itself is also a diverse visitor proposition, spanning urban, rural and coastal destinations, as well as areas of wilderness, within a relatively small footprint, and no two places are the same in terms of their situation, history, and thus their visitor offer. This diversity is a major strength.

What is a DMO and what do they do?

3. **DMOs are found across the world at national, regional and local levels.** Sometimes they are known as tourist boards, sometimes visitor or convention bureaus. The UN World Tourism Organisation defines Destination *Management* Organisations as 'the leading organisational entity which may encompass the various authorities, stakeholder and professionals and facilitates partnerships towards a collective destination vision.'[9] At their best, they are a crucial part of the tourism ecosystem.

4. **In England, the term 'DMO' means different things to different people, most tellingly even amongst those working for DMOs.** It can stand for either Destination Management Organisation or Destination *Marketing* Organisation and even within those categories no two organisations are particularly alike. I found fairly swiftly that in an English context there is no simple answer to the questions: 'What is a DMO?' and 'What do DMOs do?'

5. **Fundamental to all DMOs, however, is a desire to promote their locality or region as a visitor destination.** They want to see visitor spending increase, to promote growth locally, to provide a visitor offer that remains sustainable and competitive and a high quality visitor experience. In England, 150 is often cited within the sector as the best estimate for the number of organisations that might describe

[4] See the ONS Tourism Satellite Account.
[5] See **here** for the Aerospace Sector Deal and **here** for the Automotive Sector Deal.
[6] IBID
[7] ONS Tourism Satellite Account
[8] ONS Business Activity, size and location
[9] See https://www.e-unwto.org/doi/epdf/10.18111/9789284420841

themselves as 'DMOs' (marketing and/or management), but we do not know the true figure because there is no agreed definition or formal register. DMOs in England are organic organisations, in that they have by and large developed from the ground up; they do not exist within a top-down strategic framework or structure and have not been created or mandated by the national Government. They each cover a specific geography – usually detailed in their name (e.g. Marketing Manchester or Visit Cornwall – often a 'call to action' for the consumer). They have their own funding models, governance structures and priorities. The variation in structure, funding, performance and size across England (and globally) is substantial. No two DMOs follow the same model, or carry out the same activities, although in England it is common to find duplication of effort by separate DMOs covering the same location.

6. **There are many ways in which a DMO might promote their destination.** Marketing or promotional activities in their area targeted at domestic audiences is the most common activity. But the vast majority of DMOs also provide advice, signposting and support to local tourism businesses, share information online with potential visitors or via printed materials, carry out research to understand consumers, and seek to represent tourism interests and the visitor economy to local and national Government. Less prevalent – though still common – activities include international marketing, training and consultancy services, engaging with the travel trade to develop products (e.g. touring itineraries), and taking direct consumer bookings for accommodation, attractions and experiences.

7. **DMOs operate within a crowded regional and local landscape, and are not the only organisations involved in activities affecting the development of regional visitor economies.** There are many other players, including:

   a. **Local Authorities** – some with their own tourist departments (some of which may identify as DMOs) and some who provide funding to their local DMO. Local Authorities can also be direct players in the visitor economy, running museums, heritage institutions, and libraries for example. Local Authority involvement in, and funding for, tourism has receded over the last decade.

   b. **Local Enterprise Partnerships (LEPs)**, and their associated Growth Hubs, which can direct and administer funding relevant to the visitor economy (e.g. for training programmes or infrastructure development). The evidence I gathered suggests LEP engagement in the visitor economy – and thus with their local DMOs – varies significantly from place to place.

   c. **Mayoral Combined Authorities (MCAs)**, established by the national Government, and possessing devolved powers with direct and indirect relevance for the visitor economy (e.g. transport, inward investment etc).

   d. **Business Improvement Districts (BIDs)**, funded directly by local businesses to undertake various activities, including promotion. A number of DMOs – often those in coastal areas – follow the BID model, sometimes called Tourism Business Improvement Districts.

   e. **The British Tourist Authority (trading as VisitEngland and VisitBritain)**. VisitEngland and VisitBritain could themselves be described as DMOs on a national scale, in that they exist to promote England, and Great Britain, to domestic and international markets. Their existence, structure and role are set out in statute however[10], and as such are more formal than those of other English DMOs. The British Tourist Authority has relationships with some of England's DMOs, but not all of them and not each to the same degree.

   f. **Central Government Departments**, including but not limited to the Department for Digital, Culture, Media and Sport (DCMS) which leads on tourism policy, with the British Tourist Authority acting as its delivery body, and has a relationship with a limited number of English DMOs. Other Departments include the Ministry for Housing, Communities and Local Government (MHCLG) which funds Local Authorities, and often administers grant funding for which DMOs might bid, and the

[10] The Development of Tourism Act, 1969

Department for the Environment, Farming and Rural Affairs (DEFRA), which oversees the National Landscapes, most of which work closely with their local DMOs or indeed carry out DMO type activities (e.g. product development).

g. **Arms Length Bodies**, such as Arts Council England, Historic England, and the National Lottery Heritage Fund who administer funding, support and advice to culture and heritage organisations – which are themselves supported by, and support in turn, the visitor economy, and often work closely with their respective DMOs but not always.

h. **The private sector**, including visitor economy businesses such as hotels, visitor attractions, transport providers, bars and restaurants, event venues and tour operators which often provide DMOs with the majority of their funding via membership fees.

Why do DMOs exist?

8. **Tourism businesses are part of a wider ecosystem of businesses that collectively make up a destination**. Many companies can and do promote their own tourism business, be that a hotel chain or an airline, but the success of their business is inherently tied up with the success of a destination as a whole. Tourists do not just visit a hotel – they stay in one while doing other things in the local area, so for the hotel to be successful, it needs a strong set of local attractions, safe and clean streets, places for its guests to eat and drink, excellent public amenities and effective transport connectivity – to name a few. Consumers also tend to think of a destination as a whole, encompassing a constellation of businesses and attractions.

9. **DMOs exist because they are responding to a market failure**. Individual tourism businesses will tend not to allocate sufficient resources to advertising their destination, because doing so would result in other tourism businesses getting some of the benefit without contributing (so called 'free-riders'). DMOs fill this gap by allowing businesses to pool their resources and market the destination collaboratively. This does not remove the free-rider issue, but it reduces it, facilitating a greater amount of marketing and support than would otherwise exist if firms relied on their own resources alone, achieving economies of scale and far greater reach and impact for those businesses.

10. **DMOs can also address coordination failure**. The tourism sector is highly fragmented with many micro businesses and coordination between businesses to address collective issues such as signage or transportation can be difficult, since they may view each other as competitors for a shared, limited number of visitors. DMOs often take on place management and destination development responsibilities – for example, by advising on planning applications – acting as a unifying and collaborative force to address this fragmentation.

11. **Information failure is also an issue that DMOs can help tackle**. In the tourism sector, this traditionally manifests in two ways – businesses lacking an understanding of visitor needs and motivations (particularly those coming from overseas) and consumers lacking information on where to go and what to do – in England, this is particularly the case outside London. For tourism businesses, understanding the tastes and preferences of international consumers in a different country can require extensive market research which is beyond their budget. A DMO is well placed to fill these gaps by providing campaigns and websites that raise consumer awareness of and interest in a destination's offer, running a Tourist Information Centre, or by commissioning market research to share with businesses. Reducing information failures boosts profits for businesses by enabling them to offer consumer-focused products, increasing demand and attracting more visitors to a destination.

12. **These market failures are why DMOs exist across the world – at national, regional and local level**s. It is also why I heard of several cases during the review where DMOs folded, only to spring back in another format a year or so later. But just because there is an enduring rationale and market failures that explain DMOs' existence, it does not mean they are currently performing optimally and maximising their potential to support the growth and productivity of regional tourism in England.

The review process

13. **The Terms of Reference (see Annex A) provided to me were clear**. I was asked to examine the following three questions, and I started the review operating under the assumption that the Government thought the answer to each of them was no:

    a. Is the current DMO landscape in England economically efficient, effective and sustainable (with regard to funding, structure and performance)?

    b. Does it best enable the government to meet its leisure and business tourism policy objectives at a national, regional and local level?

    c. Is it sufficiently engaged with the wider local and regional economic landscape?

14. **It became apparent early on that many in the sector felt the review was both necessary and long overdue.** In particular, the impact of COVID-19 on DMOs and the tourism sector more generally had accelerated the need for a thorough assessment. It is no surprise that the visitor economy has suffered so much as a result of the pandemic – it is an industry reliant on the movement and gathering of people, both of which have been heavily restricted – and Government restrictions resulted in significant declines in income for tourism businesses. This had a direct impact on the finances of DMOs, particularly those reliant on membership subscriptions from businesses who could no longer afford to pay. The Government's Terms of Reference recognise this impact, and over the course of the pandemic £2.3 million has been provided by the Government, via VisitEngland, to support the survival of commercially reliant DMOs enabling them to continue providing vital business support. However, I am under no illusion that this support, whilst crucial, will be undermined or even wasted unless a sustainable, effective DMO structure is put in place to underpin the recovery of tourism across all regions.

15. **I was also asked to look at how DMOs could support the national Government's tourism policy, in particular the ability of tourism to contribute to the levelling up agenda.** The Government's Tourism policy for the pandemic recovery period is set out in its Tourism Recovery Plan, published in June 2021.[11] This sets several medium to long-term policy ambitions under the 'build back better' heading, and articulates a vision for a more productive, innovative, resilient, sustainable and inclusive tourism sector, with tourism growing in every nation and region of the UK. A common theme across the evidence gathered was that DMOs and the wider visitor economy sector are well positioned in theory to help deliver this agenda, if not in practice due to the barriers holding them back.

Gathering evidence

16. **To inform the review, I met a wide range of stakeholders from across the Tourism sector.** The engagement and consultation has been extensive, despite the short timeframe available and restrictions related to the pandemic. The methodology is described in **Annex B**, but is summarised below. It is a measure of the commitment of those working in the industry and their broad support for this review that I was able to engage so widely in the challenging timeframe. It was a privilege to meet with so many professionals across the full spectrum of the visitor economy and I am grateful for their time and commitment.

17. **In March and April I held virtual meetings with stakeholders from across the sector**, including DMOs large and small, former Tourism Ministers, sector representative bodies, *Arms Length* Bodies, and business owners. The purpose of these meetings was to conduct an initial exploration of the issues, and to get a sense of emerging themes.

[11] See **here** for the Tourism Recovery Plan.

18. **In March I also launched two consultation exercises:**

    a. Between 18th March and 4th May I ran a **written consultation exercise**,[12] which anyone could respond to. This received 340 substantive responses, from a broad range of DMOs, Local Enterprise Partnerships, tourism businesses, other bodies and members of the public. Llewellyn McLaren Consulting were commissioned to analyse the responses.

    b. Between 24th March and 16th April I ran an **online survey for DMOs only**. This survey was sent by email link to 178 organisations and focused on capturing data about their size, structure, funding model and activities. Just under 100 DMOs provided fully completed responses to this anonymous survey.

19. **In April, I also conducted desk research to place the DMO landscape in a historical and international context.** I built up a picture of the model in multiple comparator countries and the Devolved Administrations. My historical assessment went back 50 years to the 1970s when 11 Regional Tourist Boards were introduced in England, through to the introduction of 9 Regional Development Agencies in 2003 and their abolition in 2012.

20. **Having gathered a significant body of evidence, I then held nine, in-person regional roundtable discussions in June**, each with a representative group from the respective region's visitor economies. These were held across the country and I used them to explain, assess, and test the themes which had emerged from the evidence, before moving on to discuss the policy implications and potential recommendations.

Challenge Panel

21. **Throughout the review I have been ably supported by an experienced Challenge Panel.** I convened the Challenge Panel at the start of the process, aiming to ensure a diverse range of voices – both those with direct experience of working in and alongside DMOs themselves, as well as wider commercial and local Government voices. I saw the role of the Panel as being threefold – i) to interrogate themes as they emerged; ii) to act as a sounding board for my emerging thoughts about recommendations; and iii) to ensure the Review stayed focused on the key questions set out in the Terms of Reference. The panel met three times through the course of the review, including an in-person meeting in Liverpool in July to discuss emerging recommendations. Challenge Panel members also took part in the regional roundtables, and received advance copies of the draft report. Further detail on the membership of the Panel can be found in **Annex C**.

Report structure

22. **As required by the Terms of Reference, I begin this report by first painting a picture of the DMO landscape in England as I found it.** This draws on the quantitative survey of DMOs, and places the English landscape in a historical and international context.

23. **I then move on to analysing the strengths and weaknesses of the current DMO landscape.** Overall, I conclude that although there are instances of DMOs excelling in their roles, fundamentally the current model is sub-optimal. No-one would have designed the current DMO landscape if they were starting from a blank sheet of paper. The landscape is fragmented, inefficient, and lacks a structure that could and would enable the Government to meet its tourism policy objectives, and deliver effective and long-lasting sustainable growth in regional tourism. England is a relative international outlier in how 'hands-off' it is when it comes to supporting DMOs. This lack of oversight and support is holding DMOs back from achieving their full potential.

24. **Finally, I set out my recommendations for how the current DMO landscape might be improved.**

[12] See **here** for the consultation questions.

Chapter 1: Context – the current English DMO landscape

This chapter describes the DMO landscape in England as I found it and sets it in an international and historical context. The chapter covers issues such as DMO operating models, funding and geography, the activities that DMOs carry out, who they engage with and the impact of the pandemic. I appreciate that reading lots of statistics is not to everyone's taste, so I have tried to paint a clear picture as concisely as possible. For those who want to get into the recommendations quickly, I suggest remembering the following key takeaway points from this chapter but the detail and nuance is all important context for what I ultimately recommend.

Key points:

- There is a bewildering variety of DMO funding models and structures. The point that stuck out most for me was the extent of fragmentation and the large number of very small DMOs. There are at least 46 DMOs in the South East alone, with some areas covered by more than 4 organisations.
- DMOs are engaged in a wide range of activities – marketing is the most common but is not the be all and end all. 7/10 DMOs are doing at least nine different types of activity at the same time. Revenue raising activities are less common.
- DMOs speak to a huge range of organisations as part of their day job, but do not necessarily work with them closely. For example, two thirds speak regularly with their Local Enterprise Partnership, but only 18% have a formal partnership with them.
- DMOs are an important means by which the central Government distributes funding – with £500,000 on average per DMO being administered over the last three years – but only two thirds are involved in bidding for this sort of activity.
- DMO income has fallen steadily over the last few years, particularly commercial income during the onset of the pandemic, which fell by 64% last year.
- The overall story of the last decade is of the retreat of the public sector from supporting DMOs, with the national Government going first when it abolished Regional Development Agencies and then Local Government slowly withdrawing. Between 2009-10 and 2017-18, annual Local Authority spending on tourism fell by 56% a year.
- England is now a relative international outlier in how little the state is involved in DMOs operating on a large geographical scale.

Every DMO is unique

25. **Before I started this review, I knew of the significant variation in DMO structures, models, and geographies, but the review brought home to me just how varied the landscape is.** No two DMO is the same. This variation and complexity makes answering the question 'what is a DMO?' challenging. Further, I soon discovered that the Terms of Reference started on a false premise, by assuming that the 'M' in DMO stood for 'Management', as if this was common to all DMOs. While many I spoke to agreed with the acronym, there were others who felt that for the majority of DMOs the 'M' stands

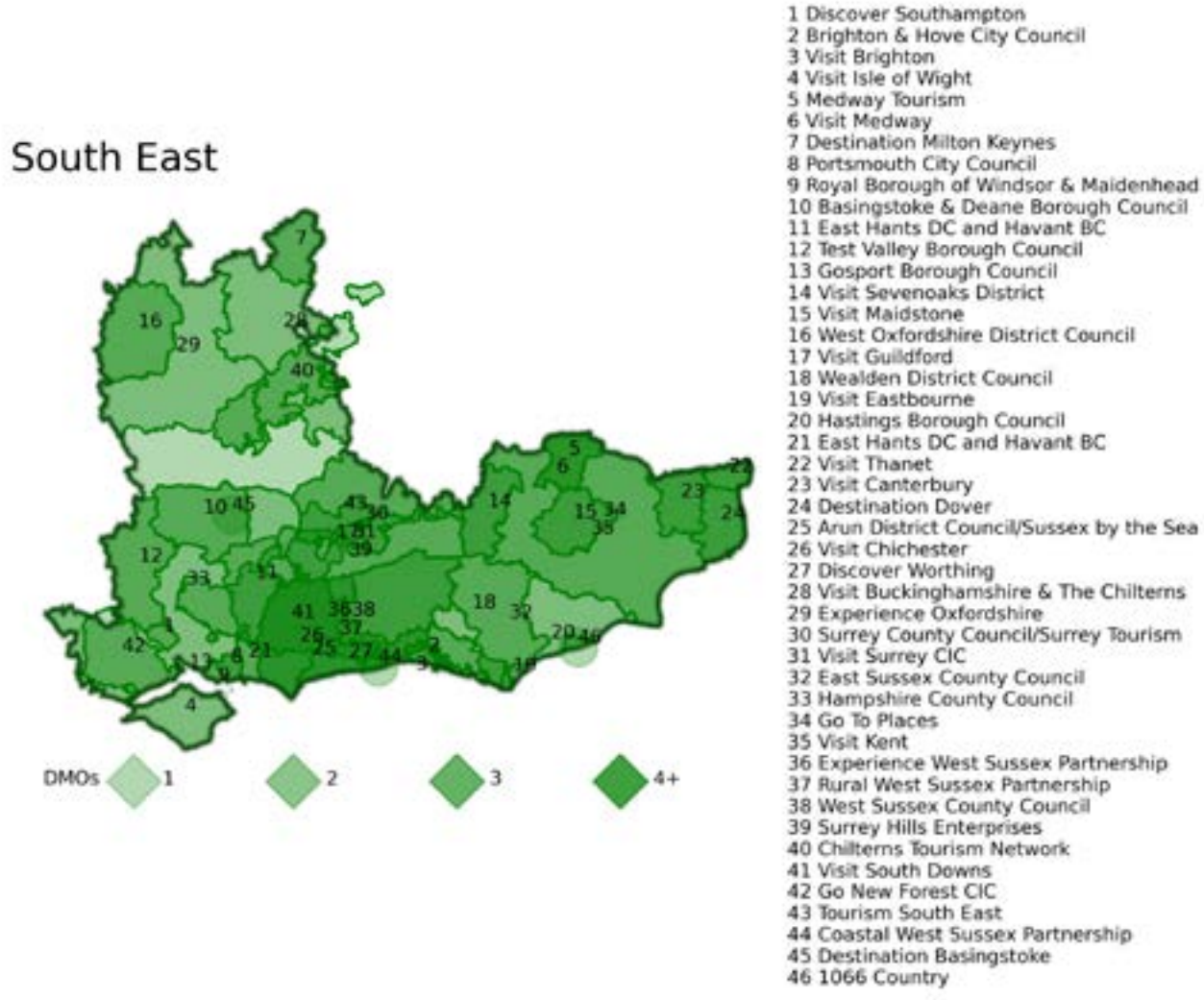
first and foremost for 'marketing', with only a limited number of English organisations fulfilling a 'Management' role. Many complained to me that there are not actually an "estimated 150 Destination *Management* Organisations in England", as the Terms of Reference put forward as fact, but rather 150 calling themselves that. The range and variation, combined with the challenge of clearly defining what 'DMO' stands for, created a need for robust and reliable quantitative DMO data to make sense of it all. The quantitative survey of English DMOs – sent to 178 organisations in total – is to my knowledge the first of its kind.[13] I received 98 responses to the survey, which is a strong sample size allowing for firm conclusions to be drawn.

Findings from the DMO survey – structure and activities

Variation is a key theme when looking at DMO structures

26. **The density of DMOs within regions is not consistent across the country.** The greatest density of DMOs lies within the South West, with 28% of DMOs responding to the survey listed there. The South East also accounts for a high proportion of DMOs (23%). This broadly tallies with a mapping exercise I conducted of the 178 DMOs to whom the survey was sent, which shows at least 46 DMOs in the South East region alone, with many examples of geographical overlap and a picture that is overall quite confusing (just look at the figure below). Other English regions see less fragmentation, for example the North East sees the lowest proportion of DMO coverage across regions excluding London

Figure 1: DMO locations in the South East of England (darker shades equal more overlap)



[13] It also became apparent that 150 DMOs was a best guess only. It did not, for example, include many Business Improvement Districts which share some DMO characteristics. We still do not know the true number of DMOs in England.

27. **The most common DMO footprint is a county** (29% of respondents said they cover a county and 7% said they covered two or more counties) – perhaps understandable given most counties are fairly recognisable destinations. 12% of DMOs represent a major city area and 10% cover a region. 16% of DMOs stated that they cover 'other' areas, often a combination of area types (for example, 'National Park, District and Coastal Areas' or 'a large city and a coastal area'. Other standalone answers included a Unitary Authority area; a district with four market towns; and a Local Authority District.

28. **The most common legal incorporation for DMOs is as a limited company** (39%), though the proportion that operate as Local Authority tourism service departments is only slightly lower at 35%. Around one in ten DMOs follow the community interest company model. Again, the 'other' answers show a broad range of potential models for DMOs, including co-operative, not-for-profit limited company, and public/private sector partnership model. This variation is perhaps not surprising given the 'organic' way in which the current DMO landscape has emerged.

29. **In terms of funding, just over half of DMOs follow a mixed commercial membership / public sector income model.** Just 20% of DMOs operate on a purely commercial basis, and 15% are solely funded by the public sector. Public sector here could mean either local or national Government, but there is no core funding available from the national Government, only ad-hoc project funding. Some DMOs describe themselves as a Business Improvement District and I did hear during the review that this model can be favoured due to the longer-term certainty it provides (BIDs follow a five-year cycle), and the scope for commercial engagement beyond strictly tourism businesses.

30. **The majority of DMOs (56%) started operating in the last decade, with a median lifespan of 10 years.** This correlates with the demise of the Regional Development Agencies under the Coalition Government (which I cover in more detail below). However, a sizable minority of DMOs – 20% – have been operating for 20 years or longer. While almost two thirds of DMOs have consistently followed the same operating model over their lifespan, a third have previously followed different models, including a greater reliance solely on public sector income, and more complex membership models. Over time there has been a marked trend towards developing commercial partnerships as sources of income.

31. **Staffing trends show most DMOs are small – with four as the median average for the number of employees at a DMO.** The majority of DMOs have five or fewer staff (62%), a further 17% employ between six and 10 people, 12% of DMOs employ 11-20 staff members, and one in ten DMOs currently have more than twenty members of staff.

32. **The vast majority (76%) of DMOs have commercial members, with a similar proportion using a tiered membership scheme, seeing members opting in at various price points/tiers.** Based on the survey results it is fair to assume that around 50,000 tourism businesses across England are members of a DMO. Membership schemes can be quite varied, with some DMOs having only two tiers of membership, with others up to five. Some DMOs offer basic, free membership options, whilst others offer one flat fee with bespoke "bolt-ons" available. DMOs have 200 commercial members on average, though a quarter of DMOs surveyed have more than 500, and 9% more than 1000 members. A pattern begins to emerge from the data here, with a small number of fairly large DMOs (which tend to be the ones operating for a longer period of time) and a large number of small or micro organisations.

33. **More than three quarters of DMOs (77%) do have a governance structure of some kind in place, such as a formal board.** The majority have a 75:25 split in terms of private and public sector representation, though a small number aim for a broadly equal split. Board members can come from across the DMO's regional visitor economy, encompassing Local Authorities, County Councils, LEPs, charities, universities, and tourism interest groups across sectors such as cruise, aviation, hotels, hospitality, attractions and Destination Management Companies. DMOs operating as limited companies, or community interest companies, were more likely to have a governance structure in place, while almost half of Local Authority tourism service department DMOs do not currently have a formal governance structure.

Figure 2: For how long has the DMO been operating, to the nearest year?

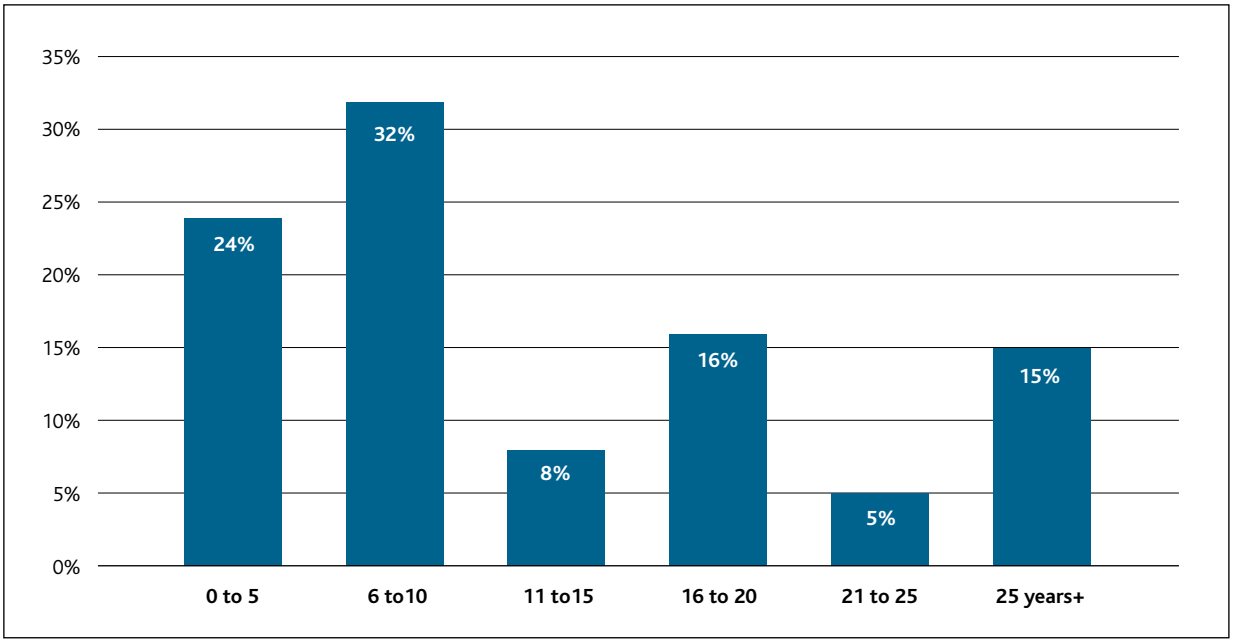
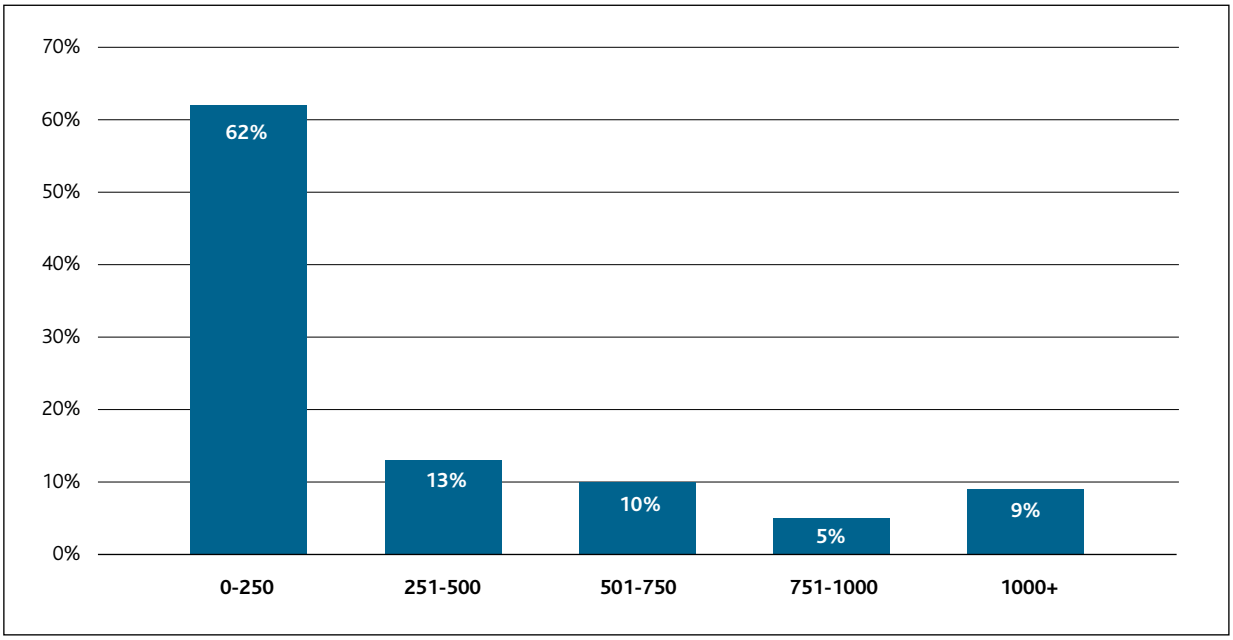


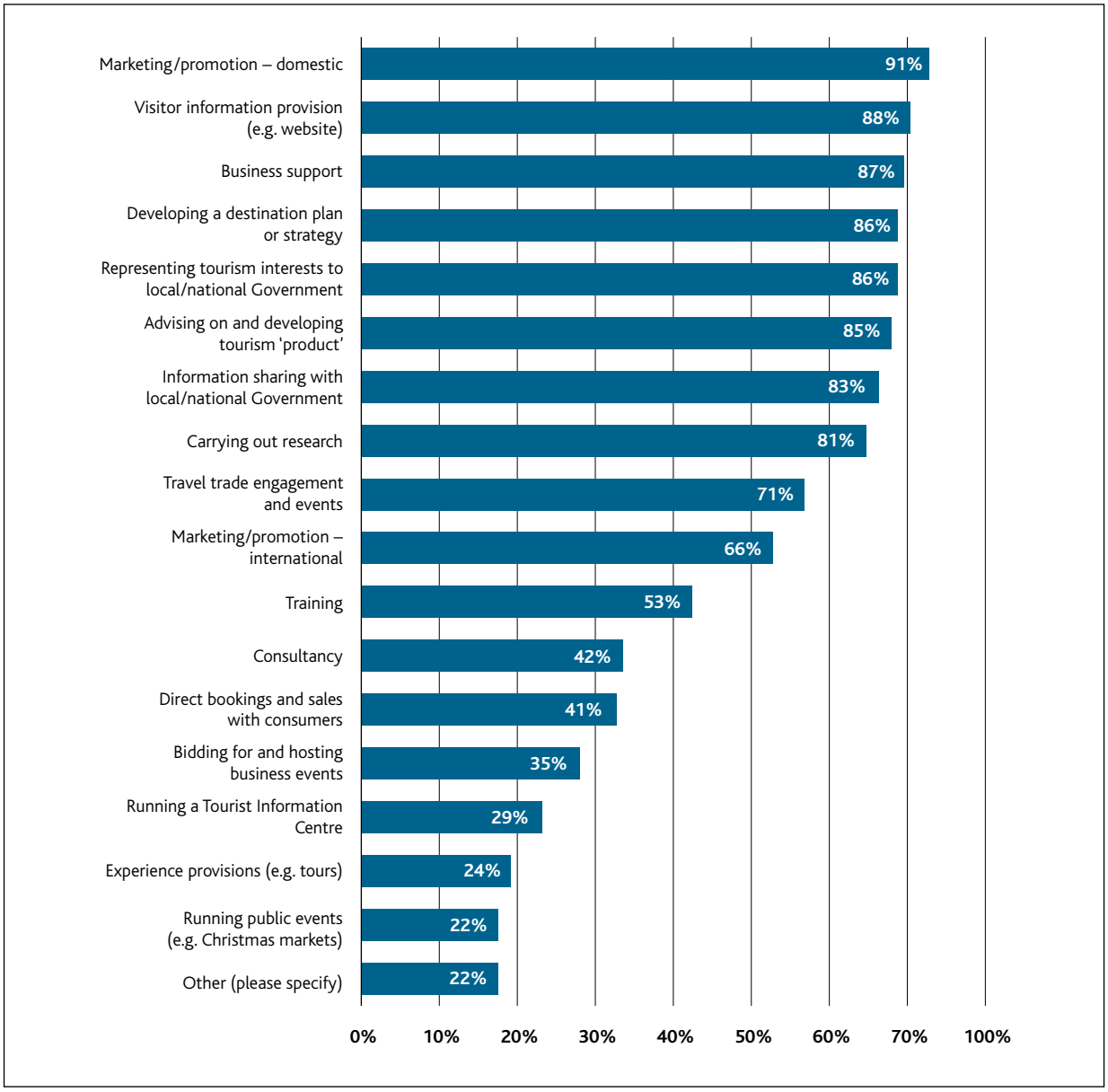
Figure 3: How many commercial members does the DMO currently have?



A wide range of activities are undertaken by DMOs – both within and beyond their areas

34. **DMOs undertake a broad range of work – 7 out of 10 DMOs carry out at least 9 different types of activity as part of their role.** I got a sense during the review that the wide range of activities a DMO is engaged in can sometimes be overlooked by important local decision-making bodies like the Local Authority or Local Enterprise Partnership. Whilst domestic marketing is the most prevalent activity, common across 91% of DMOs, visitor information provision (88%) and business support (87%) are also near-universal. 86% of DMOs also say they advocate for the sector with local and national Government, and develop destination plans and strategies for their area, though the survey did not provide any data on how effective or detailed these plans are. The figure on the following page sets out the wide range of activities that DMOs say they carry out.

Figure 4: Which of the following does the DMO carry out as part of its role (since 2018)? Select all that apply.



35. **The importance of DMOs as communication channels is demonstrated by the prevalence with which they share information with local and national Government** (83% said they do this), and carry out research (81%), while the high proportion that play a role in advising on and developing tourism 'product' (85%) shows their sector expertise. Despite the near-universal prevalence of domestic marketing (and a majority of DMOs – 66% – also carry out international marketing), it would be wrong, based on these findings, to characterise DMOs as solely marketing organisations, even if for some this may be the most visible of their activities. Once again, however, it is important to remember that the data does not show the degree to which DMOs carry out each role, or how effective they are at doing it. Just because a DMO says it 'carries out research' or 'represents the national Government' it does not mean the research is in any way robust or that the DMO is an effective advocate. Performance is a theme that I turn to in the second Chapter.

36. **Of those DMOs that do carry out marketing and promotion, the majority (60%) stated that they measure campaign returns on investment**, with fully commercial and mixed private/public sector partnership DMOs more likely to do so than those based in a Local Authority tourism services department. Reported returns ranged from £3.30 generated from every £1 spent, to £75. Other DMOs

use alternative metrics to evaluate impact, including 'Click Through Rate' on their website, social media engagement, hotel occupancy, newsletter signups, partners engaged, inward investment leads generated and visitor spend/footfall, suggesting that most DMO marketing activity is tied to some quantifiable performance measure although it can be hard here to isolate the DMO's value add or the final outcome.

37. **I found that lower proportions of DMOs carry out activities which could be revenue-raising** – for example, providing training (carried out by 53% of DMOs), consultancy (42% of DMOs), and taking direct bookings from consumers from which the DMO might take a cut (41%). Similarly, a minority of DMOs carry out events work: around a third bid for and host business events (35%), and 22% run public events such as Christmas markets. Around three in ten DMOs run a Tourist Information Centre (TIC) for their destination (29%) though qualitative evidence suggests that a number of these DMOs faced a sudden drop in expected income when Coronavirus restrictions meant these sites had to close. Unfortunately, I was not able to get a sense from the data of the amounts raised by these activities.

38. **The lack of consistency in DMO roles is illustrated by the broad spread of answers garnered by the 'other' activity option, which around a fifth of DMOs provided a response for.** Answers ranged from networking and sharing best practice, offering wider marketing services for the LEP and Growth Hub (i.e. not just tourism marketing), representing the visitor economy as part of coastal energy development projects, advising on business planning applications, running an accreditation scheme, promoting inward investment, and handling requests from film location scouts. A number of these have the potential to be developed as further DMO income streams were more DMOs aware of them and able to dedicate resources to developing them.

DMOs engage with a wide variety of partners

39. **A significant majority of DMOs said they maintain strong and regular channels of communication with visitor economy businesses and organisations, as well as with wider local, regional and national bodies.** This is to be expected – many policy levers affecting the overall competitiveness and sustainability of destinations will be held by other bodies and so a DMO needs to be able to influence them effectively. At least three quarters of DMOs (75%) speak to 9 or more visitor economy sub-sectors more than once a month, with almost all DMOs speaking regularly to attractions (96%), accommodation businesses (95%), heritage venues (93%), cultural organisations (91%) and hospitality venues like bars and restaurants (90%). Three quarters of DMOs speak to transport providers (75%), showing how their engagement extends beyond the local tourism 'offer' specifically and into broader (though still relevant) commercial sectors. To be honest, if a DMO was not speaking with the commercial sector then it would probably not survive for long. This is their bread and butter.

40. **Beyond private business, DMOs also speak regularly to an array of local, regional, and national bodies:** 89% speak to their relevant Local Authorities at least once a month, and a similar proportion speak to DMOs in the same region (85%), as well as to the British Tourist Authority (82%) and other DMOs (71%). I was frequently told that inter-DMO engagement has increased as a result of the pandemic. The majority of DMOs also speak regularly to tourism membership associations (61%), with half engaging with the Tourism Alliance (50%). Just under half of DMOs engage regularly with national Government representatives, such as civil servants in the Department for Digital, Culture, Media and Sport (46%). The DMOs that do hold these relationships are more likely to be larger DMOs, legally incorporated as a limited company, rather than those operating as Local Authority tourism service departments. The 'other' answers were wide ranging, including local energy providers, UNESCO World Heritage Sites, Conservation Boards, film offices and European tourism networks.

41. **Beyond regular engagement, the survey provides some evidence of formal partnership working by DMOs with specific bodies,** including Local Enterprise Partnerships and Business Improvement Districts (18% of DMOs say they work in partnership with each of these, respectively). The Local Enterprise Partnership figure is interesting, as it is far lower than the % provided for 'regular engagement', which 64% said they do. This suggests to me that a lot of engagement may not be

yielding fruitful outcomes. Over half of DMOs (57%) work in partnership with 'other' bodies, and the descriptions provided under 'other' demonstrate represent a wide range of organisations both within and beyond the visitor economy. These include other DMOs, Combined Authorities, Universities, Councils (parish, county and borough), Forestry England, regional National Landscapes, and Chambers of Commerce – a breadth that illustrates just how many actors there are with the potential to impact the fortunes of a destination.

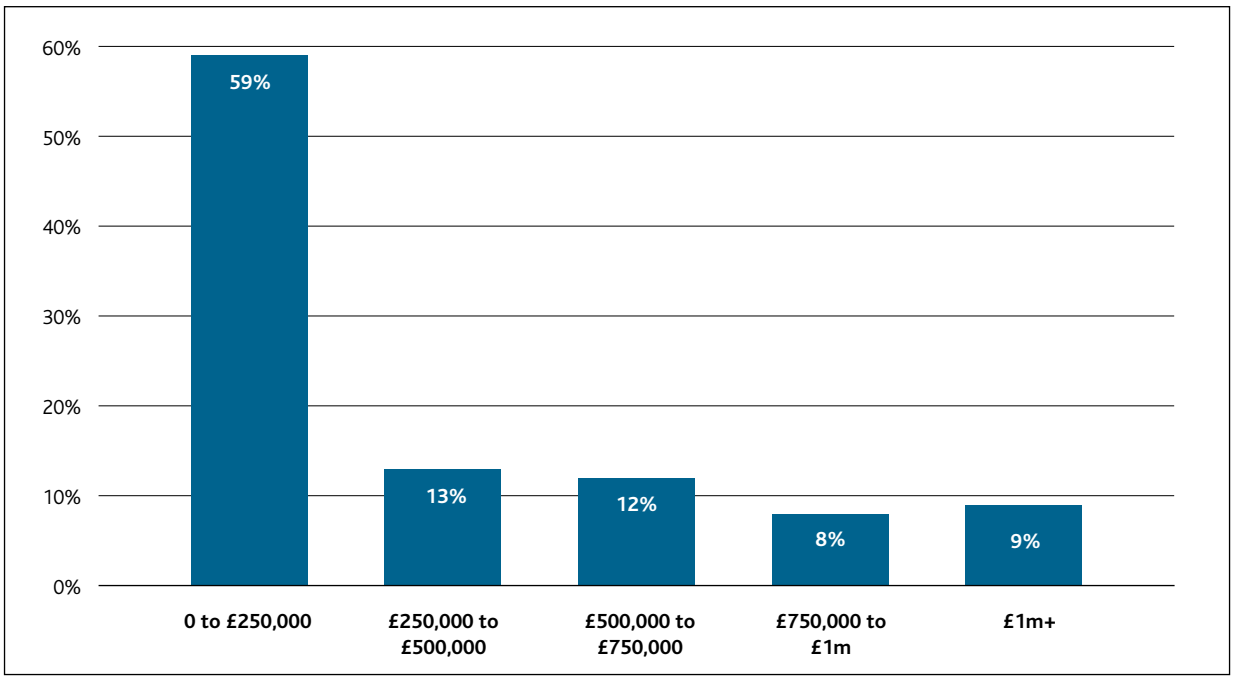
Findings from the DMO survey – Funding

Most DMOs rely on a combination of public and private sector income, though funding sources and levels vary significantly

42. **I asked DMOs how much income they received in 2020-21.** Across all DMOs, the *median* income expected was £196,000, but there was a significant range, with 40% expecting to receive over £250,000 and 8% over £1m. The *mean* average income was £410,000, and is skewed upwards by a small number of larger DMOs. This is shown on the graph on the following page, and again repeats the pattern outlined above of a small number of large DMOs and a large number of small ones. The median income from commercial sources was £50,000 (mean average £130,000) and the median income from public sources was £127,000 (mean average £280,000) – though 2020-21 was the first year where income from public sources was higher on average than from commercial sources. Types of commercial income include membership payments, commercial partners, product sales and consumer bookings.

43. **Local Authorities were the most common source of income from public sources – though Local Authority support comes in different guises.** Some DMOs receive it as part of a multi-year contract, others as an annual fee, similar to a membership fee. For around half of DMOs in receipt of Local Authority funding, it was tied to a Service Delivery Agreement which held them to outcomes, such as increased visitor numbers, increased spend and increased employment resulting from tourism activities.

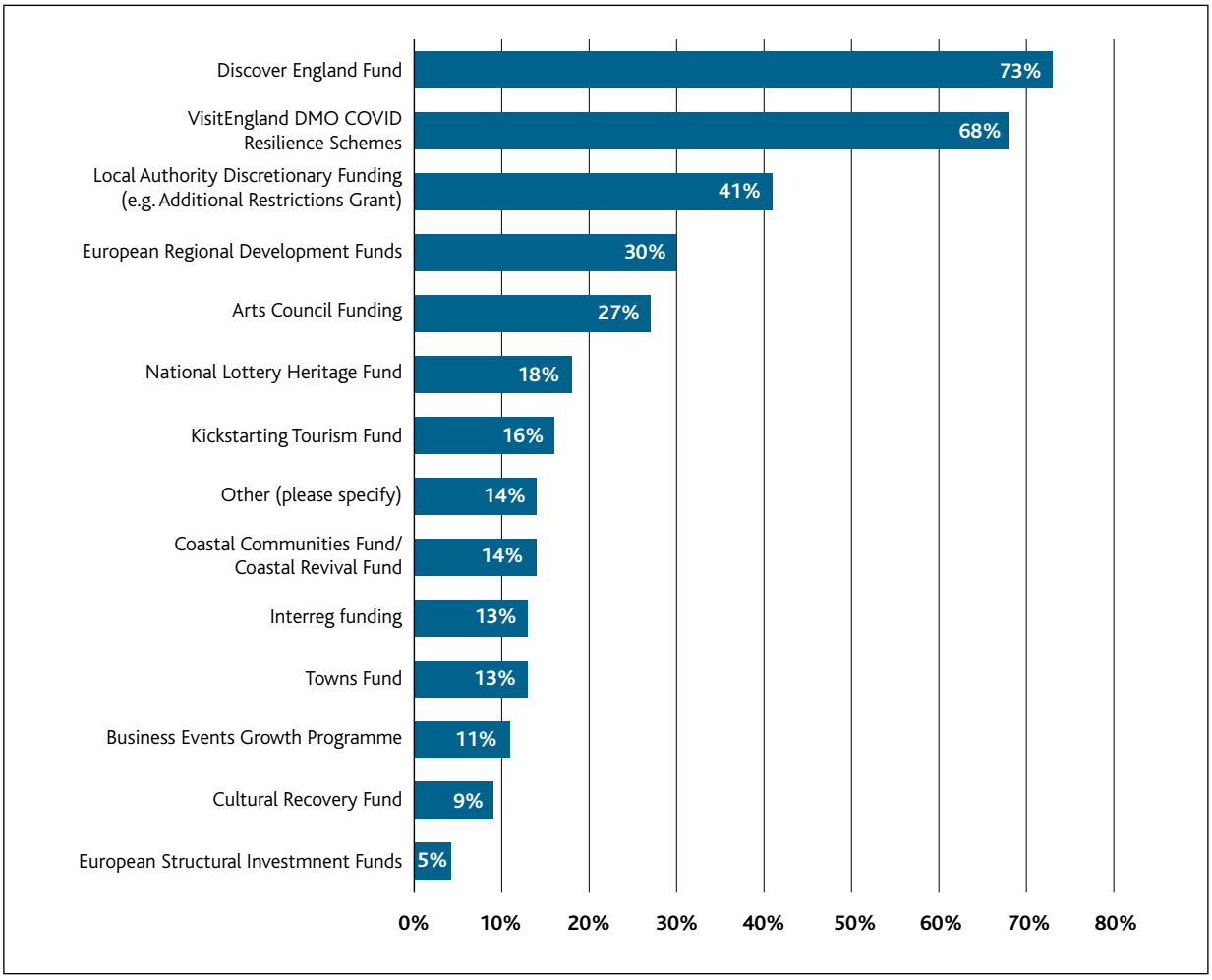
Figure 5: What is the DMO's estimated income from all sources for the financial year 2020-21?



44. **Other public sector funding streams were an important income source for DMOs in 2020-21**, with a quarter receiving public sector grants (25%), and 12% getting funding from their Local Enterprise Partnership. Examples detailed by DMOs included VisitEngland's Resilience Grants – a specific scheme set up to address declines in commercial income revenues – the Kickstart Tourism scheme and the European Regional Development Fund.

45. **Many DMOs have a lot of experience issuing grants on behalf of the Government.** Over the past three years, two in three DMOs (67%) have bid for Government funding, and the median average of Government funding administered by DMOs over this period is £500,000 per DMO. This is a significant number, especially in the context of the Terms of Reference which come at DMOs from the perspective of 'what can/do they deliver on behalf of Government'. Over a third (38%) of DMOs estimated that they had administered more than £1m in Government grants since 2018.

Figure 6: Which national Government funding has the DMO had a role in bidding for/ administering over the last three years?



46. **Government grant funds designed for DMOs specifically were the most commonly cited** – 73% having bid for or administered the Discover England Fund[14], 68% for various VisitEngland emergency DMO funding streams[15] – but wider funding was again prevalent, including European Regional Development Fund money (30%), Arts Council funding (27%), National Lottery Heritage Fund[16] (18%), and the Coastal Communities Fund/Coastal Revival Fund (14%).[17] This suggests DMOs can be an important means of directing funding to wider sectors with visitor economy interests, such as culture and heritage, and can also play a role in administering funding for regeneration projects.

[14] A £45m fund running between 2016 and 2020. The fund aimed to develop world-class English tourism products and itineraries for international audiences.

[15] In 2020, VisitEngland reallocated £2.3m to support commercial DMOs whose membership income had fallen significantly due to the Pandemic, via the DMO Emergency Financial Assistance Fund, in May 2020, and two rounds of the DMO Resilience Scheme, in September and November 2020.

[16] https://www.heritagefund.org.uk/

[17] The Coastal Revival Fund focuses on regeneration of at risk coastal heritage such as piers, lidos and promenades. The Coastal Communities Fund focuses on the creation of sustainable economic growth and jobs.

The pandemic resulted in significant falls in commercial funding

47. **Seven in ten DMOs stated that their income had fallen between 2019-20 and 2020-21** (69%), with income levels remaining level for just over a tenth of DMOs (13%) and actually increasing for 14%. Sub-analysis suggests that the DMOs whose income levels remained level or indeed increased were more likely to be Local Authority tourism service departments. Of those DMOs that had lost income year-on-year, three quarters had seen their commercial income fall (74%), while 23% had lost both commercial and public sector income. If we look at sources of commercial income – 79% of DMOs had received income from membership payments in 2019-20, falling to 66% in 2020-21, and 40% had raised revenue through consumer bookings, down to 31% in 2020-21. The same is true for Local Authority funding for DMOs: in 2019-20, 70% of DMOs received Local Authority funding, falling to 38% in 2020-21.

48. **Table 1 digs into this further, setting out DMO median income levels over time and for the future.** The table suggests that DMOs expect an ongoing shortfall in commercial income, driving a financial shortfall in the current financial year (2021-22).[18] As you can see, median income has steadily fallen since 2017-18, and the balance between the commercial/public sector has moved more towards the public sector with the onset of the pandemic. Between 2019-20 and 2020-21, the median income for all DMOs fell by 29%, but commercial revenue fell by 64%. In 2020-21, DMOs also spent more than income received, which will have eaten into their reserves. An uptick in income is expected for 2021-22, but the total remains significantly below pre-pandemic levels. It is also worrying to see DMOs forecasting a decline in income from public sector sources, following a boost in 2020-21. All this has implications for the crucial question of DMO sustainability and hardly suggests they are on firm foundations.

Table 1: English DMO median financial income – historic and future

Financial Year	Median total income	Median commercial income	Median public sector income	Median overall *expenditure*
2021-22	£214k	£78k	£81k	£217k
2020-21	£196k	£50k	£127k	£251k
2019-20	£275k	£137k	£79k	£275k
2018-19	£315k	£160k	£97k	£300k
2017-18	£324k	£126k	£105k	£207k

49. **By comparing DMO income in 2019-20 with DMO expenditure, it is also possible to estimate profitability pre-pandemic.** This suggests that the greatest share of DMOs – 37% – were profit-making organisations, with a third breaking even (33%), and three in ten operating at a loss (30%). Breakdowns of the data suggest that the pandemic's effects hit hardest those DMOs which had developed strong commercial operating models, but were often highly reliant on membership fees for income. Indeed, DMO membership data demonstrates the pandemic's impacts on this important source of income, with over half of DMOs seeing membership levels fall over the past 18 months (55%). Analysis of DMO staff levels tells a similar story: around one in three DMOs had lost staff over the past 18 months (32%) with a median average of five staff members lost across all DMOs. However, staff levels remained constant for 53% of DMOs – perhaps due to the Coronavirus Job Retention Scheme, which was used by half of all DMOs.

[18] Note that due to the use of median as the estimate of central tendency, the commercial and public sector medians do not sum to the overall median.

50. **Undoubtedly, the pandemic has hit DMO finances hard, but it is not the only hit they've suffered in recent times.** The next section contextualises the disadvantageous position that DMOs found themselves in at the start of the pandemic in comparison to both the English system of the past and the position in comparator countries.

Historical context

51. **The DMO landscape in England and its relationship with central Government has changed significantly over the last 50 years, but can broadly speaking be characterised as going through three phases.** The onset of COVID-19 could be described as a fourth phase because it has led to a shift in DMO priorities, changes in funding streams, and greater involvement of central Government/ VisitEngland, but it has not yet reached its conclusion. The first phase began in the 1970s.

Regional Tourist Boards – 1970s to 2002: a standardised regional framework

52. **Eleven Regional Tourist Boards were established in the early 1970s by the English Tourist Board, soon after its formation through the Development of Tourism Act 1969.** These Boards were companies limited by guarantee with mixed funding sources; roughly 10-20% came from the public sector with the rest derived from a mix of membership fees paid by tourism businesses and other commercial activities. Unlike the English Tourist Board they were not statutory entities but being in receipt of public funding meant they were at least in part accountable to the national government. The Boards covered large geographical areas and worked with smaller tourist boards. There was nothing like the current fragmentation we see now.

53. **The amount of core funding provided by the English Tourist Board to the Regional Tourist Boards, and the purposes for which it was provided, changed over time.** In 1998-9, for example, the nominal figure of £3.8m was provided to the Boards in order to deliver a range of regional and national programmes, and was allocated using a set formula.[19] In 2002-03, the nominal figure of £5.5m was provided to the then nine Boards, but funding was allocated based on a system of regional bids to deliver the government's tourism strategy.

Regional Development Agencies – 2003 to 2012: responsibility for strategic tourism development

54. **In 1999, the government introduced nine Regional Development Agencies.** These were non-departmental public bodies responsible for supporting economic development and investment in their regions. They had a set of statutory objectives relating to economic development, business competitiveness and employment, but with no specific mention of tourism.

55. **Between 1999 and 2003, Regional Development Agencies did not receive funding from the national Government to support tourism, but this changed in 2003.** In 2003, the Agencies took on a strategic responsibility for tourism development at the regional level, with tourism related targets included in their monitoring frameworks. DCMS contributed £5.5m a year to the Agencies for much of the 2000s. Between 2003-06 this was ringfenced for passing onto the Regional Tourist Boards (who in turn could pass it on to local DMOs), but from 2006 this requirement was removed, leading to some Regional Tourist Boards being subsumed into the Regional Development Agencies, e.g. in the North East and North West.

56. **Both the Regional Tourist Boards and Regional Development Agencies sat above, and worked closely with, sub-regional DMOs.** They were also engaged with Local Authorities and tourism businesses. For example, from 2006, the North West Regional Development Agency worked with a range of sub-regional DMOs including those in Blackpool, Cumbria, Manchester, Liverpool and Chester.

[19] See https://publications.parliament.uk/pa/cm199899/cmselect/cmcumeds/506/9060909.htm

In the South East the Regional Tourist Board (Tourism South East) remained post 2006, delivering for the South East England Regional Development Agency and working with DMOs including Tourism Berkshire, Tourism Surrey and the Isle of Wight Tourism Board.

57. **The Regional Development Agencies spent significantly more on tourism and leisure than they received in funding from DCMS.** In 2006-07, for example, the Regional Development Agencies outside London reported total spending on tourism of £36.8m, with only £3.6m of income coming from DCMS. Similarly the London Agency received £1.9m from DCMS but spent £23.9m on tourism support. Much of this expenditure is related to European Union or other grant funding and the Agencies were heavily involved in investing in tourism infrastructure. For example, the South West Agency invested £17m in the Eden Project and £12m towards the National Maritime Museum.

Abolition of Regional Development Agencies – 2012 to current: a patchwork quilt

58. **In 2010, the new coalition Government announced the abolition of the Regional Development Agencies and their replacement with Local Enterprise Partnerships.** A total of 38 Local Enterprise Partnerships were created in England, all part funded by the national Government but fundamentally they were business-led partnerships between local authorities and local private sector businesses. A key argument for their creation was to structure regional economic development bodies around 'functional economic areas' rather than public sector administrative regions. Local Enterprise Partnerships were tasked broadly with determining local economic priorities, driving economic growth and job creation and improving infrastructure and skills, but were not required to do this for the visitor economy specifically.

59. **When the Regional Development Agencies were phased out in 2012 and replaced by Local Enterprise Partnerships, DCMS funding for tourism via them was also withdrawn.** Furthermore, as Local Authority budgets were squeezed, they too withdrew funding for DMOs. DCMS estimates suggested that between 2009-10 and 2017-18, annual Local Authority spending on tourism fell by 56% a year, or £127m in real terms.[20] Many DMOs, having been able to partly rely on public funding for many decades, were now expected to fend for themselves.

60. **The Government's rationale for withdrawing public funding was set out in 2011 in a document entitled 'Government Tourism Policy'.**[21] The document recognised the need for 'strong and independent local tourism bodies to promote our different destinations effectively' and noted the existence of some capable and highly respected DMOs. However the document was critical of national Government funding for destination marketing ('unaffordable and unacceptable') and noted significant variation in DMO performance ('the worst are expensive talking shops which achieve very little, or 'civic pride' marketing organisations whose campaigns are better at massaging committee members egos than driving footfall and boosting sales for local tourism attractions'). It went on to lay out a vision for DMOs, stating:

- They should reflect the natural geography of an area's visitor economy rather than a local public sector or electoral boundary.
- That the government would *'allow'* DMOs to come together into larger groups if needed to 'share more than just marketing' such as pooling back office functions, but that any groups would be entirely voluntary and not imposed by Government 'at any level'.
- That the government will *'accept'* that destination boundaries might be messy as a result but that this was preferably to a 'bureaucratically-neat solution'.
- That the government will *'arrange'* their funding to be more focused on sustainable, commercial partnership marketing and sponsorship deals'.
- They should be 'Destination Management – rather than simply Marketing – Organisations' with *'clear mandates* to develop their local visitor economy according to whatever priorities they identify'.

[20] See https://www.gov.uk/government/statistics/local-authority-revenue-expenditure-and-financing-england-2017-to-2018-individual-local-authority-data-outturn

[21] See **here**.

- They 'must be strong partners with Local Authorities and Local Enterprise Partnerships in place-making'... 'but we will not create new institutional or bureaucratic structures to make this happen' as 'more centrally-imposed bureaucracy and process will not make bad DMOs more influential'.
- On Local Enterprise Partnerships in particular, the document noted that the DMO relationship would be 'especially important' as 'Local Enterprise Partnerships and DMOs should seek to work together to integrate destination management into wider economic strategies so that it can support the area's wider ambitions around driving enterprise, growth and employment'.

61. **In 2011, the Government predicted that 'scores of local Tourism Bodies' would be formed around key English tourism destinations.** This is what happened – as above, the survey found that over half (56%) of DMOs had been operating for under 10 years. The 2011 document went on to note that 'no matter how many local tourism bodies eventually emerge, we will also need a national body to develop and promote English tourism.' The document envisaged VisitEngland acting as a source of best practice and DMOs holding a majority of VisitEngland board seats.

62. **I would summarise the period from 2012 onwards as the government taking a 'hands-off' approach.** In the bullet point list above I have deliberately put some of the text in italics to draw out the tension between the thrust of the government's argument and what happened in practice. **By withdrawing funding and control over the DMO structure, the government effectively surrendered its ability to 'arrange' funding and 'allow' DMOs to band together if they wanted to.** The Government did not give DMOs 'clear mandates'. I shall come onto the consequences of the post-2012 changes in the next chapter, but it is clear from the findings of the DMO survey that it resulted in a fragmentation of the landscape. I am not convinced that destination management has benefited from there being 'scores of local Tourism Bodies'.

International context

63. **The key point I took from looking at what other countries do is that England appears to be the most 'hands-off' in terms of national Government engaging with DMOs at a local and regional level.** Many of the countries I looked at had DMOs at a regional level with a degree of state or national government funding in combination with private sector funding as well as clearer links back to the national Government in terms of accountability and strategic direction and some semblance of a coherent structure. For example in the USA and Germany we see regional entities funded by the states. In Japan we see a nationally led formal registration system for DMOs meeting a certain requirement. In Scotland and Wales we see the national Tourist Board playing more of a leadership and coordination role than in England. Across the board, the more localised a DMO, the more focused it is on marketing and the less a national or state Government is involved. I have summarised the key features of the countries I looked at in the table below.

Table 2: Key features of support for regional tourism / DMOs in comparator countries

Country	Key Features
USA	**National** • The National Travel and Tourism Office in the US Department of Commerce has statutory duties set by Congress, e.g. research and data collection, and official liaison to the Corporation for Travel Promotion (Brand USA). **Regional** • State tourism offices (e.g. Visit Florida) **generally funded by the State Governor**, and staffed by public sector employees. • Some operate at *arms length* from politicians, others follow their strategic direction.

Country	Key Features
USA (cont.)	**Local** • Composition and funding of local tourism offices (e.g. San Francisco Travel) varies from locale to locale. Some connected to local city/municipal Governments, some stand-alone private sector entities, some public/private partnerships. • Some State tourism offices work hand-in-glove with local DMOs, including by distributing grants to those willing to work within the tourism framework established by the state.
Canada	**National** • Destination Canada (the National Tourist Board) is set up by law as a crown corporation with specific statutory objectives including sustaining a profitable tourism industry, marketing Canada, supporting a cooperative relationship between the private and public sector and providing information about Canadian tourism to all parties across the tourism economy. **Regional** • Canadian Government support for regional tourism is largely distributed via 6 Regional Development Agencies. • These agencies have delivered pandemic-related business support to tourism businesses, e.g. a $500m Tourism Relief Fund. • **The Government of Canada sets a national strategic direction for tourism, and the Regional Development Agencies tailor the strategy/dispene support in a way appropriate for their respective regions.** • Each of Canada's ten provinces and three territories also develop and implement tourism strategies at the provincial and territorial level. • Provincial and local DMOs are either wholly funded through public funds or are a mix of public/private funding models **Local** • Provincial and local DMOs are either wholly funded through public funds or are a mix of public/private funding models. • Some are part funded by industry revenues (e.g. tourism taxes/hotel levies)
Germany	**National** • Around 100 DMOs (of municipal, regional and statewide size) are coordinated into the German Tourism Association. It is financed exclusively by membership fees and represents the interests of German tourism to policymakers and the public. It carries out activities such as quality initiatives and certifications in tourism. • The German National Tourist Board markets Germany as a destination abroad, in partnership with the marketing organisations of the federal states. It is 75% funded by the national Government. **Regional** • The *Länder* (16 Federal States) are responsible for the development of regional tourism. • **Regional tourism bodies are predominantly funded by the federal state Government, but also from their own revenues and the private sector.**

Country	Key Features
Germany (cont.)	**Local** • Many local DMOs exist to serve cities or particular regions, mostly financed by local businesses, governments and commercial activities. • The German response to my queries noted that individual city DMOs, like those in Cologne and Düsseldorf, focused almost entirely on managing and communicating the unique selling points of the city.
Japan	**National** • Structure established by the Tourism Nation Promotion Basic Law, introduced in 2007. • Prescribes the government to establish a Nation Promotion Basic Plan. • The national government provides consultation services, research and analysis and funding to support regional tourism. **Regional/Local** • The response to my queries described Japanese DMOs as 'control towers' for tourism destination development through regional marketing and management activities. • Local governments have a responsibility to formulate and implement measures that take advantage of the characteristics of the local area, as set out in the Tourism Nation Promotion Basic Law. • Funding is issued by both national and local governments to DMOs on a project by project basis. • **A 'Tourism Community Development Corporation Registration System' is used to formally register DMOs that meet certain requirements.**
Scotland	**National** • VisitScotland is an Arms Length Body of the Scottish Government. It includes a regional team of staff acting as key contacts for different regions of the country (VisitEngland does not have an equivalent team). • As in England, the Scottish Government has provided DMOs with support funding during the pandemic, as well as bespoke funding for marketing activity. **Regional** • City region and regional DMOs exist, as do regional and pan-Scotland sector groups, e.g. Wild Scotland and Developing Mountain Biking Scotland. Some receive funding via enterprise agencies on a short term basis, in order to meet strategic goals – for example in the south of Scotland a new DMO has just been established with the help of the enterprise agency. • There is no formal structure tying the activity of DMOs to the Scottish Government. **Local** • Local Destination Marketing Organisations exist but do not receive core funding from the central Government. • Some Local Authorities have set up their own *arms length* bodies to market and manage tourism.

Country	Key Features
Spain	**National** • National Government is responsible for international marketing (via the National Tourist Board, TURESPAÑA) and general tourism policy. **Regional/Local** • Each of the 16 autonomous regions has powers to deliver their own regional tourism strategy, which they do in cooperation with the national body. • **DMOs at a regional and local level do have access to public funding usually in the form of a fixed allocation within the administration's annual budget.** This is then supplemented by private or public sector income (e.g. from businesses or local authorities).
Sweden	**National** • The national government sets overall tourism policy, markets Sweden via Visit Sweden and produces/disseminates tourism research and statistics. **Regional** • Sweden has 21 regional counties. They are not obliged to take part in national tourism development work but many do and structures exist for them to do so. • Around half of the 21 regions organise their tourism work in publicly owned/ controlled DMOs with their own organisational bodies and boards. • **Between 1 and 5 million euros a year is allocated to or through regional stakeholders for tourism development, and is added to via EU structural funds.** **Local** • Local organisations working on tourism do exist, and will often develop their own plans based on the overarching regional plan.
Wales	**National** • VisitWales sits within the Welsh Government. It includes a regional team of staff acting as key contacts for different regions of the country (VisitEngland does not have an equivalent team). • No core funding is provided to DMOs by the Welsh Government but they have issued funding via specific projects or grants. **Regional** • Four regional tourism fora were established in 2014, meeting three to four times a year and bringing together key tourism stakeholders to drive the delivery of the tourism strategy for each region. **Local** • Destination Management Partnerships are a mix of public/private sector and have their own Destination Management Plans.[22]

[22] See here

64. **Analysis by the UN World Tourism Organisation, published in 2019[23] is particularly interesting, in that it focuses on institutional strengthening of DMOs and preparing them for new challenges, both key lines of inquiry for the review.** It talks about the need for a 'sound framework' to be set varying by 'level of action' (national, regional or local) but also notes that no one size fits all model can work due to the variation in the particulars of each destination. The Organisation for Economic Co-operation and Development (OECD) has also noted that 'for DMOs around the world, it is often a considerable challenge to generate the funding necessary to deliver strategic and operational benefits to a wide range of public and private sector stakeholders.'[24]

Summary

65. **Several themes emerge from my summary of the DMO landscape in England.** It is fragmented and highly variable in terms of structure, funding models and levels of income, governance structures, geographical coverage, activities and levels of partnership working. The pandemic has had a significant impact, in particular on revenue from commercial sources but also on DMO size and priorities. There is no clear framework for what a DMO in England should do and the current situation in England is an outlier, both internationally and historically, with respect to the extent to which the national government is 'hands-off' in its involvement with DMOs. I was particularly struck by just how many DMOs have been created over the last 10 years, which points towards the key theme of fragmentation. I will now move on to analysing the strengths, weaknesses, performance and impact of the current model.

[23] https://www.e-unwto.org/doi/book/10.18111/9789284420841

[24] See https://www.oecd-ilibrary.org/docserver/9074fc18-en.pdf?expires=1626273023&id=id&accname=guest&checksum=DF2DDC0D35E2B9D3C092A63DFED954BD

Chapter 2: Analysis – An assessment of the DMO landscape

This chapter analyses the strengths and weaknesses of the current DMO landscape. Although there are many instances of good practice and of DMOs adding a lot of value in terms of both quantifiable outputs and wider outcomes, **I am in no doubt that successes exist *in spite*, rather than *because* of the absence of a coherent structure and lack of Government engagement.** Furthermore, good examples are generally the exception rather than the rule. In my view, the DMO landscape that has developed over the past decade is on the whole sub-optimal, and is ultimately holding regional visitor economies back from achieving their full potential. Throughout this chapter I have used quotes from my engagement, and highlighted those in blue that I found particularly compelling.

The landscape currently has many strengths

66. **Across the qualitative consultation process, and in conversations with stakeholders both in interviews and at regional roundtables, I heard time and again that DMOs are valued and necessary local institutions.** The continued existence and ongoing longevity of some DMOs following the withdrawal of structured Government support along with the fact that many developed organically themselves after this date demonstrates that they meet a local and particularly business need, and are often the only local bodies with the experience, knowledge and expertise to fulfil a destination management and or marketing role. I have included some quotes from my engagement to illustrate this, and do so regularly throughout this chapter.

> *"It feels clearly sensible for DMOs to exist, as we should have Place based marketing. DMOs are the ones who create the brand for each destination…if they didn't exist you'd need to invent them."* Former Tourism Minister

> ***"A good DMO is greater than the sum of its parts. It speaks for the local industry, raises standards, supports training and skills, coordinates promotions and links into national structures for research and data gathering. None of these can be done by an individual commercial enterprise."*** Member of the public

DMO staff are passionate experts about their local areas

67. **An important, and frequently cited strength of the current set of English DMOs, is the local knowledge and expertise that DMO staff possess.** DMOs know their destinations, their brand and their tourism 'offer' better than anyone else, and are passionate about and committed to selling it to consumers whenever they get the chance. They can 'story tell' about their destination, tying together its key strengths to develop an appealing brand that at its best can appeal to a wide range of visitors (domestic and international), tourism businesses and other regional players. The written consultation responses in particular highlighted the dedication, expertise and drive of individual DMO staff.

> *"DMOs have a huge understanding of what their local product is, its strengths, and weaknesses, and who the regional players are – which businesses are dynamic/growing, which need support."* Tourism Representative Body

"DMOs are staffed by people with knowledge and passion about their area – they live there, they showcase it and make it work for businesses, residents, and the wider environment." DMO

"[DMO staff] are able to bring grass-roots experience to blue sky strategic thinking." Cultural Development Partnership

"It's taken time/work/energy to get here – our city is the attack brand. When seeking marketing funding they don't have to argue for this – it's a united proposition." DMO

DMOs are an important source of, and conduit for, information and intelligence

68. **Because of their local knowledge and expertise, DMOs are regarded as important conduits and channels of information between their local visitor economies and local, regional and national Government.** More than half of the written consultation respondents identified DMO prowess in gathering intelligence, and disseminating information, data, research and policy as a key strength. DMOs provide an easier route for VisitEngland and national Government to share information with the vast number of small and medium size enterprises that make up the tourism sector – a role that came to the fore during the pandemic. In turn, DMOs themselves fed crucial intelligence on the business impacts of restrictions to control the spread of the virus back up the chain to the Government, sometimes they were the only source of timely and reliable local data. Government officials that I have spoken to have been full of praise for the contribution of DMOs during COVID.

Good practice: DMOs and data during the pandemic – North of England Business Barometer

Over 2020 and into 2021, Natwest Group supported the development of a barometer, which was a survey issued over a number of waves to tourism businesses across the north of England in order to measure the ongoing impact of the pandemic on employment, revenue and business confidence.

The barometer was coordinated by Marketing Manchester and its distribution was facilitated via a network of nine Destination Management Organisations and Tourist Boards working collaboratively. The results were fed directly into the Department for Digital, Culture, Media and Sport, where they were shared with the Tourism Minister and contributed directly to decision-making.

The Barometer is a great example of how DMOs can act as a conduit of information between the national Government and the many small and medium sized enterprises making up the tourism sector.

69. **Even before the pandemic, DMOs provided an important means for the Government to obtain on-the-ground intelligence on fast-moving issues of national importance.** For example, Visit Wiltshire fed back valuable Salisbury footfall data after the Novichok incident, as did Marketing Manchester after the Manchester Arena bombings. Both DMOs then went on to receive bespoke funding from the national Government as part of a wider recovery package to address post-incident declines in footfall via confidence-boosting campaigns. It is important to note that this intelligence is provided to the Government free of charge.

"They do provide a vehicle – not perfect – for us reaching that vast tranche of SME base. The value that we managed to achieve during this last year…getting the message out to people" VisitEngland

"If there is an event where the Government needs to use DMOs (e.g. ministerial visit; after major events like flooding), we have that point of contact." DCMS

70. **DMOs regularly provide an important and efficient mechanism for the Government to administer funding directly to a local visitor economy** as we saw in Chapter 1 – from marketing campaigns like 2020's Enjoy Summer Safely campaign[25], to DCMS funds like the Culture Recovery Fund, to wider infrastructure and regeneration funds like the Towns Fund, Coastal Communities Fund and historic European funds.

DMOs have gained the trust of the private sector

71. **It is perhaps the way that DMOs marry elements of the public sector with the commercial drive of the private sector that sets them most strongly apart from other local bodies and institutions**. This private sector knowledge and expertise – along with the groundwork they put into building relationships with fee paying members and delivering returns for them – gives them credibility with tourism businesses, who often view them as trusted sources of information, support and research on everything from staff development to the latest consumer trends.

> *"It is critical to ensure [DMOs] are delivering – as fundamentally with all investors (public/private) you haemorrhage credibility if you do not deliver."* DMO

> *"DMOs provide value to their members by sharing information, customer research, rules and regulations from Govt – during the Pandemic, it's been how businesses have accessed support. [We get] emails from businesses without a DMO link – without a DMO/association link, they struggle to access support."* Tourism Alliance

> ***"Businesses do not like looking to Local Authorities for money/assistance. DMOs like [Visit X] are nimbler entities."*** DMO

Good practice: Supporting businesses during COVID-19 – Experience Oxfordshire

Experience Oxfordshire dealt with over 10,000 business enquiries during the course of the pandemic, with many being forwarded onto them by the Local Authority. The DMO went on to signpost these businesses to critical Government funding packages as well as advice.

In the written consultation, Experience Oxfordshire received praise from respondents for their actions during the pandemic, with one commenting that they represented 'an example of resilience and entrepreneurialism working against all the odds'.

72. **DMOs themselves, particularly those that lean towards 'management', often highlighted how this hard-won commercial credibility enables them to play an active role in working with their business members and partners to develop the area's tourism offer**. They offer support, advice and guidance so that businesses can grow and in turn, further add to the strength of the destination's offer. This is particularly the case in areas where particular skills and knowledge are often lacking amongst the private sector – for example, product development, encouraging direct online bookings, and targeting new markets, such as international visitors or business travellers.

> *"There are lots of food and drink businesses which have started and new accommodation providers – but a DMO has a role to nurture those businesses and bring them into the fold."* DMO

> *"Only a select amount of the county's product is promoted to consumers…lots of businesses [that aren't DMO partners] miss out on the business advice/support that would help them grow."* DMO

[25] A campaign launching in July 2020 focused on encouraging people to take advantage of hospitality and tourism businesses that were reopening following relaxation of COVID-19 pandemic restrictions. DMOs were invited to bid into a funding pot to amplify the campaign.

At their best, DMOs play an important role in advocating for the tourism sector

73. **My engagement highlighted the important role many DMOs play in supporting their members – and local tourism industry more broadly – by advocating on its behalf.** Advocacy takes place with wider stakeholders, with many DMOs speaking as the 'voice' of the visitor economy to Local Authorities, community groups, and Local Enterprise Partnerships. Having the backing of the private sector is seen as most important in enabling them to fulfil this role but it is not necessarily the case that all DMOs are being heard to the same extent.

> ***"[Good DMOs should be] advocating and communicating with other stakeholders (the Council, Local Authorities) about tourism development and infrastructure – e.g. arguing the case for transport, walking/cycling infrastructure, and marketing activity, while being seen to be unbiased by political decisions. They should be the voice of the commercial sector."*** Arms Length Body

> *"Kin to a public sector organisation but…not run by the public sector so are more responsive to the industry."* Member of the public

> *"DMOs should also be engaging with local communities so they accept visitors – there's lots of hesitance. A DMO should be able to do this – they're a representative as much of the visitor to the area as of the business in the area."* Tourism Representative Body

DMOs have clear strengths in convening and cultivating cross-sector relationships

74. **Many stakeholders pointed me towards the way that DMOs are able to connect, convene and cultivate relationships between the tourism industry and other sectors** such as transport providers, cultural and heritage organisations, and higher education institutions. Their local knowledge means that their networks can be especially strong, and this can enable DMOs to add value by linking contacts who otherwise would have struggled to find each other.

> *"ACE wants culture to play a role in attracting more/different visitors, and this requires the cultural sector to work with different – especially private – partners. DMOs have been/are key for making that succeed."* Arms Length Body

> ***"DMOs are like the glue sticking everything together, and align their objectives with the competitive market forces at work in the sector. They develop good partnerships with the sector and others"*** Tourism Representative Body

> *"[There's] absolutely a role for DMOs – they face from the city to the world, and back into the city, to say 'raise your game – standards, cleanliness'. They play both roles – the best face forward, and telling home truths."* Local Government

Good practice: A DMO makes the difference by using local connections to turn a good event into a great even – Bristol Cathedral

One excellent example of a DMO using its connections that was shared with me during my initial engagement was provided by VisitBristol (now Visit West).

They had been asked by an international client for inspirational venues for their gala dinner event, after it became difficult to deliver this highlight of their annual programme at their first choice venue due to complex logistics. Spending time with the organisers, the DMO discussed options that could provide not only that 'wow' factor that was needed, but which would also deliver against their very specific criteria. They connected the organisers with Bristol Cathedral, drawing on their network and experience as they searched for alternatives. A private dinner within the Cathedral was subsequently negotiated, this being the first time the Cathedral had been used for that purpose by the DMO's convention bureau.

Not only did it prove to be an incredible and well-received experience, but the success also enabled the Cathedral to use the temporary kitchen infrastructure needed to deliver such an operation for other events, enabling them to generate further income.

75. **The DMOs regarded as the strongest tend to be those that connect their commercial member needs with public sector decision makers**. In my experience, these DMOs are often those that cover a geographical area that aligns well not only with the consumer proposition (both for visitors, and for business members) but also with the relevant local Government boundaries – be that City, District or County Council, or Mayoral Combined Authority – and, on occasion, with that of the Local Enterprise Partnership.

> ***"Because the funding is often driven by local authorities, the geographies represent local authorities which are not necessarily natural tourism market geographies and that is a challenge."*** DMO

> *"For a DMO to be at its best then it needs to fit within [the] wider local economic strategy led by the Local Enterprise Partnership."* VisitBritain

When DMOs collaborate with each other, they can achieve economies of scale

76. **The evidence I took suggests that cross-DMO collaboration is welcome both to DMOs themselves and more widely**, as a way of sharing local best practice, developing new product offerings, and achieving economies of scale (for example, by amplifying a united voice and message for advocacy). However, some noted that DMO collaboration is often driven by the dedication of individual staff members, happening in spite, not because of, the current DMO landscape. Others noted that DMOs can tend towards competition, especially when funding opportunities are limited – creating a DMO vs DMO mindset that exacerbates existing fragmentation.

> *"With so much DMO experience…you either fight the system, or find a way to collaborate and benefit from the relationship."* DMO

> *"Collaboration and cooperation happens by accident rather than by design as they don't have a strategic network with aligned objectives. Quite a lot…is informal and relationship-driven; coincidental rather than driven from the centre."* DMO

> *"The tension is that DMOs tend to be in competition with each other too – sharing best practice has its limits. It's similar with funding applications – why would DMOs share that information when they're in competition for funding."* Tourism Representative Body

77. **The Discover England Fund initiative received almost universal praise for the role it had played in encouraging DMOs to come together.** This was a five-year, £45m product development fund administered by VisitEngland. It brought DMOs together as projects and catalysed a collaborative, rather than a competitive, mindset. The Fund put DMO competitive expertise to good use in developing market-focused products and enabling them to achieve greater market reach – and, in time, attract more visitors – than they would have done alone. The Fund also serves as another good example of the point referenced above about some DMOs being able to act as recipients of Government funding – without a DMO network, VisitEngland would have been severely challenged to deliver a product development fund of this scale. It also shows that with the 'carrot' of Government funding, less fragmentation occurs; as a result of their experience working together on the fund some DMOs have combined.

> *"DEF as a principle has been a good exercise. It needs refining, but it gets DMOs to collaborate on a market rather than competing – if you grow the market, all will benefit – a bigger cake."* DMO

> *"The Great West Way is a good example. DMOs need to realise that it's in their interests to grow the cake vs the slice, and cooperate sensibly/tactically for greater strategic gain."*
> Tourism Representative Body

Good practice: An excellent example of collaboration – The Great West Way

The Great West Way was one of the first initiatives to receive support from the £45m Discover England Fund, with the shared ambition of creating one of the world's premier touring routes between London and Bristol. The touring route can be travelled by road, water, bicycle or on foot and promotes an extraordinary variety of visitor experiences alongside many of England's most iconic tourist attractions including Bath, the Cotswolds, Stonehenge and Windsor.

The Great West Way has attracted investment from 270 businesses, including Bristol Airport, has taken 450 bookable products to international and domestic markets, has a network of 90 Official Tour Operators promoting Great West Way itineraries in 16 countries.

The initiative is led by Great West Way Ltd but brings together a wide range of DMO types including Business Improvement Districts, inward investment agencies, community interest companies, limited company DMOs and DMOs operating out of Local Authorities. It works with over 1,500 businesses directly and 5,000 indirectly via DMOs. There are 26 investing DMOs in total and the project is a great example of what can be achieved at scale with DMOs working collaboratively together and with VisitEngland.

In support of the Government's sustainable tourism ambitions, the team are now working on developing the Great West Way's credentials as a carbon neutral touring route.

78. **The pandemic was also cited as an important driver for DMO collaboration.** For example, DMOs worked together on intelligence gathering surveys to ensure a consistent approach to data-gathering between regions. Another good example is in the South West, where the Great South West Tourism Partnership, formed of DMOs in the region as well as business representatives, came together on a weekly basis to share impacts and insights with the Government and VisitEngland. The group also developed a recovery plan for the region – an impressive achievement, considering the South West is one of the most fragmented areas when it comes to DMO coverage.

> *"They have also developed a partnership in the South West, rising above regional politics/challenges with shared objectives/aims for the region…they came together due to C19, to do research, respond to the Pandemic, and develop a headline recovery plan for the region, at a Local Enterprise Partnership/regional level. They recognised that longer-term issues were shared and could be resolved by joint working – productivity."* Tourism Representative Body

79. **I also came across a small number of examples of DMOs in a region coming together to rationalise and standardise back-office functions.** For example, Visit East of England has, for the past three years, run internal systems for itself, Visit Norfolk and Visit Suffolk, saving the respective councils and Local Enterprise Partnership over £160,000 compared to when the DMOs operated out of Local Authority tourism service departments. This rationalisation has meant the area has been able to dedicate more energy to skills work and recruitment in the sector, as well as to marketing the region – leading to the region moving up rankings in VisitBritain's consumer sentiment survey. Similarly, earlier this year Visit Bristol and Visit Bath DMOs merged to become Visit West: a single organisation that maintains two discrete consumer-facing brands for the cities and their surrounding areas.

> *"All local DMOs with a joint marketing budget to promote the region as a whole with a new brand – 'Unexplored England'…the first time all the local DMOs and local authorities have worked together on a tourism promotion."* Local Enterprise Partnership

> *"They now have weekly meetings across the East of England – 14 DMOs, which work well."* DMO

"The…city brands will be retained – but behind the scenes there'll be one membership programme, one advertising programme, and standardised travel trade and business development delivered across the region. They've already launched a convention bureau, to take advantage of big opportunities offered by the universities/new businesses. [It] removes duplication and means two cities [work together to support] the surrounding area." DMO

Good practice: A strategic focus can yield results – Ipswich

The All About Ipswich DMO has a seat on the Ipswich Vision board alongside the MP, the local authorities, the Business Improvement District, the university, the Local Enterprise Partnership and the Chamber of Commerce. The grouping around strategy has successfully attracted £25m from the Town Deals Fund to revive the area, including over £2m to enhance digital provision in the town centre and wide region.

This is viewed as having potential to dramatically improve the reach of the DMO and improve the experience of visitors to the area. By working with local partners through the Vision coalition, the DMO will have brought substantial investment and development at no additional cost to members.

DMOs can provide some evidence to illustrate where they add value

80. **DMOs were eager to provide examples of where their activity has added value to their members and partners, as well as to wider regional bodies – and, indeed, to the experience of visitors themselves.** Despite an often-cited lack of detailed quantitative evidence about where a DMO had added value – which I examine in later on – there is nonetheless a significant body of anecdotal best practice examples of DMOs going above and beyond in their roles, often driven by the strengths, skills and personal dedication detailed above. This is particularly the case in relation to the role DMOs can play in winning major events for their area, for example by putting together a delegate package involving hoteliers, attractions, restaurants and so forth that can make the idea of hosting a conference in that destination more attractive. The role played by London and Partners during the 2012 Olympics is a very strong example of this. DMOs can also provide evidence of how many users there are of their business support products. For example, Visit Cornwall told me they've had over 1,000 businesses attend their business support webinars which help with subjects such as diversification and embracing technology. Businesses up and down the country praised their DMO as adding value as part of the review. These included the likes of Paultons Park, Beamish Museum, Chatsworth House, Castle Howard and Thameslink. But perhaps the best evidence of DMO impact is their continued existence in spite of the Government's 'hands-off' approach over the last decade.

However, much about the current DMO landscape is unfit for purpose

81. **Before looking at the weaknesses of the current landscape, I think it is worth reflecting on two points relating to the strengths listed above.** First, I did not find the strengths present in a consistent way across the country; they are present to varying degrees only. Second, where the strengths are present, they exist in no small part due to the energy and enthusiasm of DMO staff themselves. The National Government cannot take credit. Below I have set out what I consider to be the weaknesses of the current landscape, based on the evidence gathered.

The complexity and variation of the DMO landscape holds it back

82. **The current landscape is overly complicated.** There is little consistency. To be clear, my criticism is not about the fact that there is variation at all – this must always be the case because of how varied England's tourism offer is – but rather the fact that the current landscape is such a patchwork quilt that it can be extremely difficult to get one's head around and it lacks coherence. Perhaps the most

telling indication of this is the consistent difficulty I experienced in trying to get a clear answer from people as to what a DMO is and what they do. It felt at times as if I was being asked to come up with a definition myself. The fact that there are multiple answers to the 'What is a DMO' question is in my view a problem and many consultees impressed upon me the need to bring a degree of coherence to the landscape as part of the review process.

> *"The biggest problem is the definition of a DMO. Do you mean a Destination Management Organisation or Destination Marketing Organisation?"* Local Government

> *"Intellectually there should be a definition of what a DMO does and what it delivers, but that hasn't been the case in the past…the policy has not been to establish tightly what a DMO is."* VisitBritain

83. **The complexity and variation is confusing not only for DMOs themselves, but also for their users** including potential business members, potential visitors (both domestic and international – who have to navigate multiple destination websites to plan a visit) and other sectors, such as arts, culture and heritage – who, evidence suggests, find the current DMO landscape so mind-boggling that they don't know how to engage with it, or what they could gain from doing so. In turn, this makes it even harder for DMOs to do their jobs as conveners, brokers and advocates of the visitor economy. Public sector policy makers – at all levels of Government – were also clear in their evidence that definition is needed as the current landscape is so confusing as to cause disinterest. Some of the examples of duplication and fragmentation are particularly bewildering. For example, why was I told that both Lincolnshire Council and Visit Lincoln are both undertaking destination marketing activity? Why does Devon have a Visit Devon, a Visit Dartmoor, a Visit Exmoor, a Visit South Devon, a Visit Totnes, Destination Plymouth and Exeter City Council getting involved?

> *"Larger businesses at a national level will find that all DMOs are competing to get national partners, but there's no way for a larger business to partner with DMOs on a national campaign."* Tourism Representative Body

> *"[Historic England] teams don't see DMOs as a natural partner for work. Anecdotally – it's not that DMOs have nothing to offer us, it's that Historic England doesn't think to seek them out. There's a mutual lack of connection, meaning opportunities aren't taken."* Arms Length Body

> *"Alton Towers – they sit in three areas – that's crazy, you don't want to pay membership 3 times – you want something more strategic."* DMO

> ***"[We're] based in North Devon. So fractured, nothing ever gets done. Wouldn't bother us if [DMOs] weren't there. It's completely different in Cornwall – more engagement. In North Devon, [we] feel very isolated."*** Business owner

The lack of structure and extent of fragmentation exacerbates inefficient competition and weakens the power of the sector's voice

84. **The head-scratching complexity of the DMO landscape is in no small part due to its organic development over the last decade.** In the last ten years, the number of DMOs 'mushroomed' across the country but with no clear structure or strategy to follow – often leading to overlap, fragmentation and DMOs pointing in different directions. This has led to a competitive mindset among DMOs, making it harder for DMOs to collaborate and share best practice examples that would encourage regional spread, strengthen businesses, and increase the overall competitiveness of England. Moreover, fragmentation has resulted in DMOs often reliant on the goodwill and commitment of a small number of staff (remember – 62% of DMOs employ five or fewer staff members).

> *"The structure of DMOs doesn't work. No two are the same – everything from one-person bands, to totally subsidised teams of 30+, to a public sector/commercial funding blend. It makes the landscape very complex and hard to unpick – you can't say what's good/bad/in between due to their localised construct, funding, and role."* DMO

85. **I got a sense from larger DMOs engaged in more than just 'marketing' that it was particularly frustrating to see smaller DMOs continually spring up within their region.** One consultee described it as 'whack-a-mole', another that a shiver goes down their spine when a new 'Visit such and such' springs up. The reason? Brand dilution and more confusion for everyone. Local Authorities, inward investors, national tourism brands (e.g. major hotel chains, Merlin) and so on get confused about who to work with, and who to invite to the decision-making table. A significant number of written consultation respondents pressed on this, outlining their view that there are too many DMOs and this inhibits effective and efficient coordination.

> *"[The DMO] has to deal with confused structure on a day-to-day basis – for example, new DMOs setting themselves up and duplicating work)…as well as funding, we also need clarity in terms of what a DMO is."* DMO

> *"[DMOs are] missing out on coordination and structure…a piecemeal approach, all fishing in each other's ponds."* VisitEngland

86. **The lack of structure also inhibits DMOs' potential to influence and deliver national policy objectives.** As it stands, the current landscape is too variable and fragmented for the Government to be sure of a consistent approach from place to place – making it harder to rely on DMOs as a delivery partner for events and funding on a national scale, and meaning that funding available can sometimes be seen as going to the 'usual suspects' – the 'strongest' DMOs. More worryingly, the fragmentation and ensuing competition also diminishes the collective voice of the visitor economy, making it harder for DMOs to make themselves and their members heard when important decisions are being made locally, regionally and nationally and preventing a collective response or a strategic approach which would deliver economies of scale.

> *"An individual who can lead and is visionary will direct things and write bid proposals – if they can't do this, they don't get funding. This needs addressing to even the playing field – currently successful DMOs build on their success, while others languish."* DMO

> *"Structuring DMOs so they could connect to economic decision-makers, with funding and strategies would be game-changing, gaining more than would be lost."* Arms Length Body

> *"The fundamental issue isn't about marketing – it's about data, understanding the industry and getting them to work collectively together and the small interventions government needs to make to push this on strategically."* DMO

DMOs are beset by funding struggles, with funding models skewing priorities

87. **DMO funding – or the lack of it – was one of the key challenges raised across my engagement.** The consultation identified that DMO funding models are at least as complex and confusing as the structures the funding goes to support, with many respondents feeling unqualified to comment, or unclear as from where exactly DMOs get their income. The quantitative evidence suggests that this is likely due to the many different DMO legal and corporate structures and sources of funding across the private and public sectors. It is, of course, positive that many DMOs rely on private sector income – since it demonstrates commercial buy-in and allows businesses to pool resources for a common good and achieve economies of scale. However, over-reliance on membership income as public sector funding has tailed off not only left commercially-focused DMOs vulnerable when the pandemic hit, it has also led to what was described to me as the 'doughnut effect': many DMOs stated that they spend too much of their time tactically chasing membership income at the expense of the core of what they are there to do.

> ***"The Board spends too much time trying to survive, especially over the last 12 months. The Board has had some exhausting and rough rides with funding."*** DMO

> *"[DMOs] end up chasing funding and being at the behest of existing funding models."* VisitEngland

88. **Further, if funding predominantly comes from membership subscriptions, then that will skew the DMO's priorities towards what those members want.** This is fine for those that pay, but what about the smaller enterprises who cannot afford to pay the top rate of fees? Can the DMO give 'impartial' advice to potential visitors? And if the Government wants to level up, should it be satisfied that DMOs are only promoting part of their destination? Furthermore, too much time chasing funding means too little time on bigger, longer-term strategic agendas which, if addressed, would benefit the whole destination and yield long term results. Key questions, like how do we extend the tourism season to boost productivity, or how do we become a more sustainable destination, can go unanswered. A DMO cannot spend time developing a 10 year vision if it is forever worried about its survival going into the next year, and starts that year not knowing its budget.

> *"The industry wants the DMO to do what it wants (marketing). The membership body limits potential to drive bigger agendas."* DMO

> *"DMOs sometimes do not seem interested in the skills of the sector, instead focussing on marketing. As a result…they are not thinking about the future of the sector."* Local Enterprise Partnership

> *"DMOs are always looking to make money, and that can distract them from the bigger picture, rather than focussing on economic growth."* DMO

> ***"Within DMOs the top businesses have a much bigger voice, like the top 6 in the League, and everyone else has a smaller voice, leading to volatility in county tourism."*** Former Tourism Minister

89. **Respondents were clear, though, that they did not expect Government funding to replace private sector funding.** I got the sense from many that commercial income should be the predominant source, just that the balance at the moment was not quite right. What DMOs lack is a firm foundation from which to build and they struggle to get that from the private sector. It was an interesting point of reflection to me that DMOs with a healthy public/private income split were generally more stable and more strategic. For them it feels less like they are operating in quicksand. It was also interesting how many said that they did not need funding for domestic marketing as that is the bread and butter and – pandemic aside – the private sector will be able to cover those costs.

> *"[The DMO] are chasing funding but they are a social enterprise and think it is important to be publicly and privately funded….being held to account is good and [we] wouldn't be advocating for full funding by the public sector, just some core funding."* DMO

> *"Some DMOs are so small that they can't do the research and business development needed to expand and develop market intelligence and training – they focus on marketing, with buy-in from the commercial sector."* Arms Length Body

> *"Knowing resource was coming would sustain security to look forward 3-5yrs when planning campaigns, and allow for product development."* DMO

90. **From a funding perspective, much comparison was made by consultees between the present landscape and that under the Regional Development Agencies, where Regional Tourist Boards could rely on core funding.** It was interesting for me to look back at the past and see that the national Government only provided a small % of overall funding under the old models. In 2006-07, for example, DCMS provided £5.5m to the Regional Development Agencies on Tourism, but £61m was spent by them on tourism overall – showing what can be leveraged from a small amount. There was a sense of loss in relation to the demise of the Regional Development Agencies which, although not perfect, did bring a degree of clarity to the system as well as some strategic focus.

> *"RDAs allowed DMOs/destinations to have a skills/capacity audit of what was needed to build up tourism competence locally. They could recruit to provide perspective/voices strategically, rather than tactically, and could gather compelling evidence to build up investment cases for e.g. all-weather playgrounds or boutique hotels – they had a sense of what the locality needed to develop/ bloom."* Tourism Representative Body

"Regional Tourist Boards, pre-RDAs, were smooth/strong – not perfect, but gave a sense of purpose to e.g. skills agendas, channelling Govt funding, getting the sub-region to collaborate. They facilitated/enabled." Tourism Representative Body

"We are only here following the fall of the RDAs because of luck and survival instincts." DMO

91. **Another consequence of spending too much time chasing short-term funding is too little time spent looking at opportunities for income generation over the longer term.** One area that suffers here is events, which have a long time frame before they 'pay off' and generate returns. This is because of the time it takes to bid for, organise and run events, many of which only take place on an annual basis. The pay off can be significant though, not only in terms of the money spent at the event itself but also the onward consequences for inward investment. A great example was shared with me about World Mobile Congress and Barcelona. As a result of the event being won for that city and hosted there annually, the city now has a thriving telecoms industry. With some exceptions, DMOs lack the skills and understanding of the events industry to know the value they can add, lack the time and space to develop those skills, and are often reacting to queries that come in rather than going out proactively to assess potential opportunities and bring them in. And more broadly, DMO staff commitment and passion can sometimes mean that activities that could be generating income – for example, advising on planning applications, or carrying out research – is often done for free. A more ruthless, commercial mindset that put a deserved price tag on these activities could increase and diversify DMO income streams.

"DMOs could be more commercial, considering consultancy, event management, producing itineraries, content..." Tourism Representative Body

"Business events take longer to get the traction they need. Takes a bit of warming up, but there is a pay-off. It is a slow burn with sound economic principles that underpin it. DMOs need to pay the bills immediately – they therefore don't have the bandwidth to invest."
Local Enterprise Partnership

"Currently Government relies on DMO goodwill and unfunded effort. DMOs overdeliver and shout about what they do, masking the problem." DMO

92. **The issue of skills within DMOs is also exacerbated by current funding models.** This is of particular concern in relation to digital skills, a key emerging area that the tourism sector must make the most of if England is to remain competitive. Digital skills and knowledge are low in general across the tourism sector, and are not helped by DMO staff themselves lacking the expertise and the resources to help support businesses and upskill them. I lost count of the number of times I was told that DMO websites were 'poor' and I got a sense many DMOs were not sufficiently equipped to embrace opportunities like the online business to business platform TXGB or marketing via mediums such as TikTok. Furthermore, if a DMO does not know what it's annual budget is going to be at the start of the year, it stands to reason it is going to struggle to attract and maintain skilled staff.

"The danger, especially digitally, is that businesses wait for people to come – they need to look at the travel trade/US markets – the DMO connects them to these, improving productivity and providing reasons to visit the UK." DMO

"Go to Devon – no websites or poor websites." South West Roundtable

DMOs need greater incentives to support Government priorities

93. **While DMOs do recognise Government priorities, and some of the best are already pursuing work to support them, this is not the case across the board.** Many are aware of the gains that could be made by carrying out strategic work, but stressed the need for the 'carrot' of funding to incentivise them to do so – else the funding models snap them back to focus on maintaining private sector income and supporting those members that pay their bills. This is what other countries with a strong tourism offer do – they administer public funding to a limited number of especially strong DMOs operating at a

sufficiently large level to make an impact. As I set out in Chapter 1, England is a relative outlier in terms of how 'hands-off' its national Government is.

> *"A DMO can translate what's happening centrally and understand what's being done locally at a grassroots level. At the moment there's a gap between what comes out of Govt and what happens on the ground."* DMO

94. **Over 35% of those responding to the written consultation stated that the perceived absence of a national strategy or coordination function for DMOs does not help DMOs in delivering on national priorities.** The current lack of structure leaves DMOs feeling unmoored, and all pointing in different directions. The Government's Tourism Recovery Plan is a clear statement of strategic direction, and thus offers an opportunity to get the engagement and buy-in of DMOs, but the Government must do more than just publish a document. DMOs are going to struggle to work with them in partnership to deliver the Plan under the current model. A puppet master cannot operate if half the strings are broken. Furthermore, the Government will continue to face calls for a 'tourism tax' or 'visitor levy' as a way of raising public investment in the visitor economy if it does not plug the funding gap, which it has said it will not do in the Tourism Recovery Plan – rightly in my view given World Economic Forum analysis that the UK is one of the least price competitive tourist destinations in the world.[26]

> ***"There's a lack of strategy in England, a common focus on what we're trying to achieve nationally. The lack of strategy means there's not a harnessing of resources to point people in the same direction. An England strategy should be the starting point on what DMOs are trying to achieve."*** DMO

95. **One area that emerged from the consultation as ripe for collaboration was the sustainable tourism agenda.** There are many facets to this, including conservation of the natural, historic and cultural heritage, addressing the UK's 'balance of trade' deficit which sees UK nationals spend far more abroad than inbound visitors spend in the UK,[27] moving towards more sustainable business practices and understanding changes in consumer demand. DMOs are very keen to get going on this agenda, and it seems obvious to me that the Government is going to struggle to corral the vast number of businesses in the sector to engage on it without them, but currently DMOs cannot focus on it.

> *"The Council is committed to net zero. We can get our members involved and provide feedback about systems that don't work. The DMO can also be an advocate for skills – we piloted a productivity programme."* DMO

> *"We know we need to present ourselves as sustainable; having that as a pillar of work means that they then look for partners doing this. You could have a number of strategic pillars saying as a country this is what we need to work on."* DMO

96. **Place-shaping is also a strategic area where DMOs feel they could do more, with the right support; this would contribute in turn to levelling up.** DMOs know their local area better than almost anyone else, and are aware of the challenges it faces, particularly in places with high deprivation and poverty. They have the connections needed to build stronger skills networks, encourage inward investment, and support areas to regenerate, bringing visitor spend back to the destination – but at the moment, they can't dedicate the energy and resource to doing so, nor are they always able to influence the relevant decision-makers.

> ***"The visitor economy should be working hand in glove with direct inward investment into [the county]. Through visitors, they are encouraging people to live and work here, as well as visit – that will support levelling up agenda. Today's visitor is tomorrow's investor."*** DMO

> *"LEPS are currently working out what levelling up means for them…the lack of HMG clarity on its priorities means that LEPs – or DMOs – can shape them and provide some of the solutions themselves."* Local Enterprise Partnership

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[26] https://www.weforum.org/reports/the-travel-tourism-competitiveness-report-2019

[27] https://skift.com/2020/05/06/the-winners-losers-of-a-staycation-world-ahead/ suggests the UK would add 1.1% in GDP if all outbound tourism were converted to domestic.

97. **Another promising area is that of inclusive tourism.** This is important to levelling up, and the Government's Tourism Recovery Plan, rightly in my view, sets out an ambitious vision for a more accessible and inclusive tourism sector. This is particularly relevant in light of COVID, which has seen many of England's visitor destinations enjoy vast numbers of first time visitors who would normally go abroad. Again, I sense DMOs are keen to engage on this, and work with businesses to make their products more accessible, but struggle to do so due to the ever present threat of a balance sheet that does not add up.

98. **The written consultation in particular identified an issue with the diversity of DMO governance and staffing structures.** Around 10% of respondents felt compelled to raise (without prompting) that Boards could sometimes lack a diverse set of perspectives and thus feel unrepresentative of the sector. Gender and ethnic diversity were raised, but I think diversity was referred to more broadly than that. There was a sense that Boards across the visitor economy were composed of the 'usual suspects', drawn from a narrow pool, and did not take on a broader set of perspectives, including potentially new consumers. This may be why the groups to whom I spoke that are working to increase audience diversity and access for minority groups like Tourism for All, and MOSAIC Outdoors could cite only limited examples of working with DMOs. I think there is a clear opportunity for DMOs to become more diverse and inclusive, which would in turn help building welcoming destinations that cater for all visitor needs.

> *"Some want advice/guidance, some are more involved. It's patchy and hard to quantify. National Parks have seen a rise in ethnic minorities across the country. [We] can't measure impact in places, but see new and diverse audiences coming in."* Tourism Representative Body

Robust quantifiable evidence on DMO impact is lacking

99. **Bar a few, the majority of DMOs were unable to provide reliable, consistent evidence on where and how they could prove their own value add.** When pushed, DMOs tended to fall back on visitor footfall data, but this is going to reflect many factors and does not isolate the impact the DMO had. Other common measures include website traffic, social media engagement and ad clickthrough rates but these do not provide a measure of conversions. DMOs have my sympathies on this though. The only way you can really tell if someone has been influenced by a marketing campaign for example is to ask them, and I have my doubts about the extent to which people are reliable witnesses here. Perhaps this is why some DMOs talked about their role in bringing events to a destination, because here you can more clearly distinguish the role of a DMO. The problem, though, is that so few DMOs involve themselves in the event industry. This is why, for me, the best evidence of DMO value add is the continued existence of DMOs themselves. It demonstrates the market failure rationale for their existence perfectly.

> *"ACE really struggled with lack of DMO data expertise/experience. Culture is data rich, talking about audiences, while DMOs talk about visitors – these are different people in terms of evidence. They were unable to get enough data to demonstrate an impact, or plan for the future. At a local level, there's a role for DMOs to capture this data effectively."* Arms Length Body

> *"A Destination Marketing/Management Organisation doesn't have a tangible product, which makes it difficult. [We] look at ad clickthrough rates, website traffic, social media engagement etc, and ask businesses to tell the DMO where the business came from. As an example, Kathy Lettes did a Telegraph piece…a five-star B&B has had 5 bookings as a direct result."* DMO

> *"We do have [data], but it's out of date. The STEAM report – and the last one was done in 2015. It showed something like 6,000 people employed in the sector and worth £420m, which seems massive but it's an important sector here."* DMO

100. **One reflection on evidence I had is that DMOs are in somewhat of a 'Catch-22' situation.** The sector lacks the skills, experience and funding to gather robust evidence and deploy it. They are not provided with a framework that brings consistency across the country, due to the lack of coherence /

structure across the landscape. The paucity of evidence in turn makes it harder to justify giving them funding to actually go out and get the evidence. It is particularly frustrating for the pandemic to arrive just as the Discover England Fund was about to bear fruit and generate returns on investment. The promising early results were cut off by restrictions on inbound travel, limiting the products' target audiences. However, I think the quality of the products created will bear fruit as the sector recovers.

> ***"[DMOs are] so focused on short-term goals, due to funding constraints, they almost can't see the benefits of long-term investment due to the lifecycle of political reality. They need to be confident enough to base investment decisions on evidence and data"***
> Tourism Representative Body

Engagement with regional and national decision-makers needs to be more strategic

101. **I heard a significant amount of evidence that – despite the best efforts of DMOs – it is a challenge to get the voice of the visitor economy heard when important decisions are being made locally, regionally and nationally.** Engagement with Local Enterprise Partnerships in particular was often noted as an area of difficulty. This was ascribed to overlapping remits and local tensions. Many DMOs expressed frustration at what they saw as Local Enterprise Partnerships being unwilling to listen to DMOs and take on board their arguments for the importance of the visitor economy. DMOs and other contributors working in tourism often felt that the visitor economy was dismissed as a 'low productivity' sector compared to e.g. aerospace – rather than considering how to support the visitor economy to deliver higher productivity gains and regional growth. This suggests that the two thirds of DMOs who speak to Local Enterprise Partnerships on a regular basis may be knocking on a locked door. There were a few limited instances of Local Enterprise Partnerships working with DMOs once they had been convinced of the visitor economy's local value – suggesting that the lack of quantitative evidence on DMO impact may be hindering their engagement with wider decision-makers – and causing a 'chicken and egg' scenario.

> ***"Even good LEPs lack an understanding of the cultural economy or the visitor economy more broadly, compared to Local Authorities. They see it as cream teas on the Isle of Wight which harks back to the 1950s."*** Local Government

> *"Worryingly, few LEPs seem to appreciate tourism's economic significance or invest in it proportionately, or have meaningful relationships with DMOs/businesses."*
> Tourism Representative Body

> *"Covid will hopefully change the ranking of where the visitor economy is in LEPs' minds as they now see the impacts on the local economy when these businesses are shut."* DMO

> *"Where DMOs work closely with LEP Growth Hubs there is an improved business support offer for businesses in the sector and duplication is avoided allowing resource to focus on the gaps in provision."* Economic development agency

102. **Even though two in five DMOs operate as Local Authority tourism service departments, Local Authorities were similarly seen as unresponsive to their area's visitor economy**. This was sometimes ascribed to the fact that tourism is not a statutory service, so Local Authorities have no obligation to fund it. In turn, this means that Local Authorities do not involve DMOs in discussions about developments that would have wider implications for the visitor economy. This constrains DMOs' potential to influence more strategic, longer-term 'management' issues, the levers for which often sit with the relevant Local Authority (for example, transport infrastructure, licensing laws, or public realm assets like beaches). This could stem from the ongoing confusion over a clear DMO definition – the consultation analysis showed that Local Authorities in particular felt there needed to be a clearer definition of DMOs – as well as constraints on local public sector resources. From the DMO perspective, I got a sense that some did not wish to be so closely tied to their Local Authority as it risked being subject to changing political winds.

"Right now the country understands the value of tourism in a way it never has before…we understand its value at the moment. [I'm] willing to bet in a year we will be back with challenges of how to prove the value of tourism to LAs." VisitEngland

"DMOs' advocacy role with LAs/LEPs is most important – they should talk to LAs about relaxing licensing laws and advocate for LA changes that best support the recovery of the visitor economy." Tourism Representative Body

"DMOs are always a secondary actor in the place…they need to get their relationship with other organisations right. Places with weak LAs/public/private sectors struggle – how to have a DMO, let alone work well with their DMOs." Arms Length Body

103. **Mayoral Combined Authorities (MCAs) on the other hand, appeared to be able to foster more positive and productive relationships with DMOs in their area.** Cited examples included Greater Manchester and the West Midlands – perhaps unsurprising, given that in both cases the DMOs' boundaries map closely on to those of the MCA, and in both cases the DMOs work out of, or in close partnership with, the MCA. The devolved control which MCAs have over policy areas with visitor economy relevance – e.g. transport, skills, inward investment – seems to allow scaled-up collaboration with DMOs in a way that is more difficult for Local Authorities and Local Enterprise Partnerships to achieve. In turn, this allows DMOs more influence over strategic place-shaping work, ensuring that the visitor economy is recognised when important decisions are being made, and able to contribute to levelling up and increased productivity ambitions over a broader regional geography.

"The DMO model would work more successfully if it mirrored other Government structures, and its structure will be fine as long as it has power/influence and a clear governance mechanism." Local Government

"[The DMO] doesn't just do tourism, they support inward investment marketing and wider comms on the overall [area] economic strategy." DMO

"The mayors are useful – they bring huge amounts of soft power and we're lucky that our current mayor has business credibility which helps with private sector investing here." DMO

104. **Universities and education providers were also cited as a regional stakeholder group with whom DMOs could build stronger relationships.** This was both in terms of strengthening the sector skill base, offering training, and promoting tourism as a long-term and attractive career option, and also in terms of collaborative research – for example, DMOs working with their local universities on sustainability initiatives or wider place-shaping projects. While there are limited pockets where this is already happening, fragmentation and lack of resources makes it hard for universities to engage consistently with DMOs, and vice versa.

"A place based approach is vital. All tourism interests are place-based. The DMO should be a powerful hub that draws on other powers – universities, governance, private and voluntary sectors etc." Member of the public

"Universities is a key area that could be developed." Local Government

"[We] advocate very strongly, and run a visitor economy week with colleges in the region looking at training and skills and highlighting opportunities; they identify funding gaps for e.g. digital skills needs." DMO

There was criticism about the lack of formal structure/engagement between DMOs and national Government, particularly VisitEngland

105. **I encountered widespread frustration amongst DMOs with respect to their engagement with the British Tourist Authority, particularly the VisitEngland branch**. The lack of any formal relationship between DMOs and the National Tourist Board was the main complaint, with DMOs feeling disconnected, unmoored from, and indeed unaware of, the national Government's tourism policy. This

was often contrasted unfavourably with the structures employed for other sectors – for example, Arts Council England and its National Portfolio Organisations – which were felt to set clear remits and strategic objectives for the organisations delivering on the ground. In contrast, evidence suggests that many DMOs feel unclear about what VisitEngland expects from them and how that fits with a wider strategy. The relationship with the National Tourist Board was also compared unfavourably to the position in Scotland – which was regarded by multiple consultees as a better resourced and structured operation – and to the past – with many DMOs not feeling connected to a national strategy since the days of the Regional Development Agencies.

> ***"There can be a barrier between DMOs understanding what VisitEngland does and how to engage with them – and VisitEngland being close enough to see what's happening in destinations."*** DMO

> *"There is no clear steer from either VB or DCMS about what DMOs should be doing, what their function is and how it fits with the wider strategy for tourism."* Local Government

106. **It is important to stress, however, that respondents also praised the role VisitEngland played during the pandemic.** In particular, DMOs pointed to the swift distribution of funding under the two DMO resilience schemes, the regular pan-DMO calls and the introduction of a dedicated DMO Slack channel that was introduced to share advice and guidance. The VisitBritain branch also received praise, with some DMOs making good use of the international network of staff and offices to promote their brand to international audiences. Furthermore, many DMOs praised VisitEngland's research and data function, often relying on it for information on domestic and international consumers. But again, close relationships were often seen to rely on individuals' commitment, rather than a formal structure.

> *"[VE] ran a 'meet the press' event which was very useful, as was the ability to take logos/brands from the Escape the Everyday campaign and use them. [But] the 'big' DMOs get heard – [the DMO's] real interaction with VB/VE began via us setting up a meeting."* DMO

> *"With VB/VE we work in places/spaces we couldn't without them. There's a consumer filtration process…but you get out of a relationship what you put in – [the DMO] works hard with VB/VE – there's no clear/formal liaising process so it may not work for others."* DMO

107. **There was also some sympathy with VisitEngland's position.** There was widespread recognition that VisitEngland cannot engage with over 150 DMOs on an equal basis. There are too many. This links back to my reflections above about the complexity and fragmentation of the landscape – but also reflects VisitEngland's funding position. Consultees cited its lack of funding over the past decade, especially in comparison to Scotland and Wales, as preventing it from fulfilling a role that DMOs would like to see – acting as a point of contact between DMOs and national Government, providing a framework for and bringing coherence to the landscape, and working with DMOs to ensure their strategic plans align with national priorities. From some DMOs I also got the sense that they themselves lacked the time and resources to engage with VisitEngland, linking back to my earlier points on funding and prioritisation.

> ***"VisitEngland, on the other hand, are a shadow of a national tourist board and are not on the same level whatsoever as Scotland and Wales. That weakens sub-regions…and leads to DMOs 'thrashing about' trying to get business."*** DMO

> ***"My impression is that Visit Britain and Visit England are in a similar situation to my local DMO i.e. undervalued and underfunded."*** Tourism Representative Body

108. **One final reflection here is that some in the sector looked to VisitEngland to act as a 'super advocate' for the tourism sector, but I think this is a misreading of their role**. VisitEngland is an Arms Length Body of Government, directly accountable to Parliament and Ministers, and has a statutory responsibility to encourage people to holiday here and improve tourist amenities and facilities in England. VisitEngland has a statutory role to advise the Government on tourism policy but it is not a lobby group. This can be a positive for DMOs, in that there is an organisation well placed to ensure

their views and needs are incorporated into national policy making, but it does mean VisitEngland need to be discrete, and to give advice that balances an array of competing priorities. In my view DMOs themselves need to be the 'super advocates' for the tourism sector although for all the structural and funding reasons I've set out, I realise there are barriers to achieving this.

Events are an under-appreciated and under-resourced sub-sector

109. **The events industry is vital to the overall fortunes of the tourism sector.** This is recognised in the Government's Tourism Recovery Plan, which notes that business events alone are worth over £31.2 billion a year in direct visitor spending, not to mention the £165 billion of trade transacted at these events each year. A particular strength this sub-sector can offer is its ability to fill up accomodation stock in the off-season, making it an important ingredient in any attempt to improve the sector's year-round economic productivity. Business visitors are also liable to return with their families for another visit.

110. **However, I found it to be a largely unappreciated sub-sector by most DMOs.** There are some exceptions to this, such as those in Manchester, Liverpool, Birmingham, Newcastle and London, but on the whole it felt as if leisure tourism was the predominant focus. This is partly reflected in the grant funding administration data described in Figure 6 in Chapter 1 – with only 11% of DMOs making use of VisitBritain's Business Events Growth Fund. I recognise that this is likely to be driven by the structural and funding issues I outline above, which do not incentivise or facilitate a focus on activities that do not offer an immediate return (although there are business tourism activities with the potential for a quick return like incentive travel), nor do they give DMOs the time and space to upskill staff. However, when DMOs do engage they can add significant value as they are the best placed body to enhance an event by packaging together an offer for delegates that the event venue alone cannot provide. A DMO can bring hotels together to offer a discount, get local dignitaries involved to provide a welcome, bring universities or museums in if the event has relevance to their areas of expertise and so on.

Ultimately the DMO landscape is not fulfilling its potential

111. **The greatest sense of frustration I encountered was at the sense of a missed opportunity.** I refer both to the opportunity to fully realise the potential of England's many potent attack brands, and the potential of DMOs themselves to act as advocates, conveners, and shepherds, operating at the spearhead of growing regional tourism. I have outlined the reasons for this above, now I want to dwell a little on its consequences.

112. **So long as DMOs are not packing their full punch, England's offer beyond London will struggle to get onto people's radars internationally.** I do not mean to underplay the impact of the pandemic on London's visitor economy, and as the Government's Tourism Recovery Plan makes clear any recovery solution must involve London, but I do think it is worth reflecting on its pre-pandemic dominance. In 2019 London received 22 million inbound visitors. The next most visited English city was Manchester, with 1.6 million, many times lower.[28] Our gateway cities, our regional National Landscapes, and our world-class coastline need the resources and support to raise overseas awareness of everything they have to offer, and fully unleash their potent brands on international audiences. I do not think this needs to come at the expense of London though. **I want a DMO landscape able to grow the size of the entire pie – that is the essence of levelling up.**

113. **Furthermore, structural barriers holding back tourist activity outside of London are likely to remain.** So long as DMOs do not have a consistent 'seat at the table' on decisions relating to transport and infrastructure, the needs of the visitor economy will remain unrepresented. Issues that have long held international tourists back, such as the bewildering complexity of rail network ticketing, will persist. Furthermore, so long as DMOs lack the time and resources to assess and articulate issues such as seasonality and sustainability, insufficient attention will be paid to them. Key arguments, like today's tourist being tomorrow's investor, will continue to be under appreciated.

[28] https://www.visitbritain.org/town-data

114. **In the current DMO network, the Government therefore lacks a fully functioning policy lever to support its tourism agenda.** The Government has set out clear objectives around levelling up, Net Zero, and economic recovery. Tourism has huge potential to support this, not least because of how the visitor pound brings income and jobs to local communities across the country. Yet with the current DMO landscape, the Government can only rely on a subset of DMOs – and only then for them to do certain things. Most of the time I get the impression key decision-makers look elsewhere, such as to Local Authorities, because of the flaws in the current landscape that I set out above. It's past time for that to change.

Chapter 3: A way forward – Recommendations for change

It was clear from my engagement over the course of the review that all parties, not just DMOs, felt that the current landscape in England is inefficient and ineffective, when looked at as a whole. The extent of variance and fragmentation, the lack of coherence and structure, and the consequences of the national Government's 'hands-off' approach all act as a drag on the ability of DMOs to achieve their full potential.

From my discussions with Ministers, I believe the Government is serious about the swift recovery of the tourism sector and maximising its (huge) potential to contribute to the levelling up, productivity and sustainability agendas. However, for this to happen it needs DMOs to be at their best.

What does success look like?

Do we need DMOs?

115. **DMOs are here to stay.** I think it's always a good idea to start from first principles and I sought to do that over the course of this review by asking the question of whether or not DMOs are needed at all. But the question is moot. There will always be DMOs. The market forces and nature of the tourism industry make it so. That's why they exist across every region and destination in the world with a developed tourism industry and it's why they continue to operate in England despite the "hands-off" approach taken by the national Government following the abolition of the Regional Development Agencies. The real fundamental questions are instead threefold: what does a high-performing DMO deliver, under what conditions does that arise, and what is the role of the Government in creating and maintaining those conditions?

What does a high-performing DMO look like?

116. **Below I have set out what I consider to be the key features of a high-performing DMO.** This is compiled based on the many examples of best practice that were shared with me over the course of the review, and also following my reflections on all the evidence gathered. Some of England's DMOs are hitting many, or most, of these criteria, but there are many DMOs that are not, for the reasons outlined in Chapter 2.

a. **The DMO will be actively involved in destination *management*, not just marketing**. Being entirely or almost entirely a marketing organisation is fine and answers an understandable business need. However, I am trying to look at DMOs from the perspective of the national Government and their ambitions for growing tourism in every nation and region, and I believe they stand to gain far more by working with those DMOs that look at destination development in the round.

b. **Effective destination management is built around the consumer.** This is vital. The consumer does not think about where they visit in relation to bureaucratic or administrative boundaries, be they constituencies, local authorities or Local Enterprise Partnership Areas. The DMO must also be able to articulate the characteristics that make their destination unique and attractive, be able to differentiate that from others and combine it into a compelling brand.

c. **The DMO must have a clear strategic and long-term vision for how to develop their destination in line with its key strengths and ensure it remains competitive and sustainable.** This plan should have the support of relevant stakeholders. They must also keep pace with changes in consumer behaviour and preferences, to remain competitive.

d. **The DMO will act as the 'broker' and/or 'convener' for the visitor economy in the area they cover.** They will bring the full range of organisations in their geography with a stake in their visitor economy and the ability to influence it together, and mobilise them around a shared vision or strategy for enhancing the destination for visitors and business members. This should reflect and represent the local community as well as the diversity of their visitor economy. They should be true public, private and community partnerships, should be able to mediate competing interests and should have a degree of independence from local competing political interests.

e. **The DMO will be a strong and trusted advocate for their visitor economy.** This means they will have the trust of all relevant stakeholders in the destination to articulate the needs of the visitor economy. They will be able to provide strong evidence and market research to back up their assertions, including on the specific value they are able to add and the issues holding the destination back from reaching its full potential. DMOs should be able to articulate the return on investment of every pound spent. They should have a seat at the table in decisions that will affect their visitor economy: for example those around transport, inward investment, skills programmes, and application for central Government capital grants.

f. **The DMO should be well integrated with the country's overall tourism strategy.** They should understand what the national Government is seeking to achieve and orientate their strategies to deliver that (in a way that makes sense for their own visitor economy). They should have the capacity to deliver Government grant-funded or other projects if required and the national Government should be able to rely on them for an informed and up-to-date assessment of the situation on the ground. These points also apply to Mayoral Combined Authorities.

g. **The DMO will be outcome-focused and sustainable.** They should have substantive delivery plans and be focused on their delivery. Presently, a large swathe of DMOs spend a disproportionate amount of time seeking funding to survive and should become more adept at raising commercial revenues. Furthermore, too often smaller DMOs lose sight of the bigger picture and simply become vehicles to boost individual egos, creating unhealthy and unproductive fiefdoms.

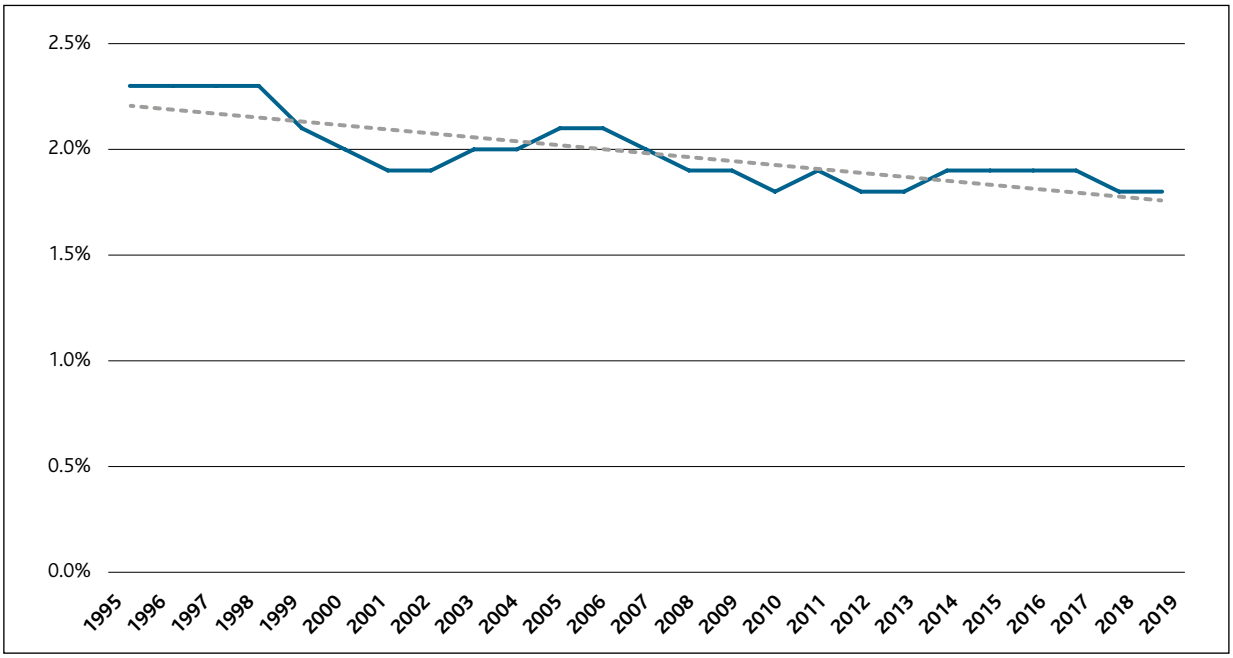
h. **The activities they undertake should match the development needs of the destination.** As we have seen, there are many different activities DMOs can and do undertake, from marketing providing support to businesses, to developing products and itineraries, providing information to visitors or acting as a convention bureau. What a DMO does precisely needs to be based on local needs first and foremost.

117. **My first set of recommendations focuses on what I think the Government needs to do to 'level up' DMOs across England so that the country is covered by a DMO network performing as set out above.** I want to see DMOs excelling across England, driving forward growth in regional tourism. This is undoubtedly a shared ambition between government, local communities and the tourism industry and I believe DMOs can provide the local leadership that is needed to fulfil the tourism sector's potential.

Recommendations for Government

118. **It is in the Government's interest to have high-performing DMOs.** As I set out right at the start of this report, the visitor economy makes a huge contribution to the UK's overall social and economic life. The number of jobs it supports is substantial, as is its impact on the country's overall wellbeing. Tourism is an internationally competitive industry, and the UK should be striving to at a minimum to retain its market share, but this hasn't happened over the last decade with the UK slipping down the overall visitor rankings. For example, between 2011-12 and 2018-19 the UK's international arrivals grew by 27% – obviously good news but ultimately slower than the world average (29%) over that period and slower than many competitor countries such as Germany (33%).[29] Market share has also declined, as the chart below shows. The story of English tourism in recent times is one of decent performance, but also of unfulfilled potential. If DMOs, as a crucial cog in the tourism ecosystem, are not functioning at their potential best, then this will affect the sector as a whole. Given how much the UK has to offer, we should not be satisfied that France gets more than double the number of international visitors we do each year.

Figure 7: UK share of total inbound world arrivals 1995 to 2019



119. **The pandemic has highlighted how important England's DMOs are to the Government.** There were many examples pre-pandemic of the Government working with DMOs – with two out of three DMOs having administered or bid for Government funding in recent times and an average of £500,000 pushed through them over the last three years – but the pandemic has seen the Government rely more heavily than usual on DMOs for information, intelligence, and business support. The national Government needs DMOs as an intermediary between them and the 230,000 tourism businesses across the country. However, this review has found that the DMO landscape is fundamentally not cohesive enough to support Government policy in all parts of the country consistently and effectively. Equally it was not lost on me that the overall lack of cohesion means that the advocacy of DMOs for their visitor economies is far less effective than it could be – their collective voice is diluted by the fragmentation.

120. **I am convinced that the national Government can and should be playing a greater role than it currently does to support DMOs.** Many DMOs certainly have the appetite to reach the performance level I set out above, but I do not think they alone can solve the problems of fragmentation, funding, structure and performance that I found in my review. Indeed, if DMOs were to try and solve this problem themselves without Government intervention I am convinced it would only exacerbate the differences, not heal them, as the last decade has shown. And where would they get the money from?

[29] Source: World Bank Figures: https://data.worldbank.org/indicator/ST.INT.ARVL?most_recent_value_desc=true

121. **I am also convinced that a wholesale change in approach is needed, rather than small tweaks. This will require the Government to provide funding.** It is essential, however, for DMOs to continue to receive the lion's share of their funding from the private sector but an over-reliance on this means priorities will ultimately always be skewed towards destination marketing and away from destination management. Furthermore, there will not be a sufficient focus on longer term issues and revenue raising activities. The Government also cannot expect DMOs to lean into national priorities if it is not going to work collaboratively with them or help them recover from their fragile state as they emerge from the pandemic. Incentivising strong DMOs with core funding seems the most effective way of achieving this.

122. **However, if the Government decides to play a greater role, it must be careful.** It is certainly conceivable that Government intervention could exacerbate existing issues, or create new ones, if mis-handled. In particular, it must appreciate that the diversity and breadth of England's offer is a fundamental strength and not impose a uniform one-size-fits-all solution that treats every destination as having the same needs. It must also appreciate that the consumer should come first and so should not try to fit DMOs neatly into existing administrative structures. Finally, if it decides to provide funding it must also hold DMOs to account for delivery. My recommendations are designed with these considerations in mind.

Recommendation 1: The Government should bring coherence to England's DMO landscape via a tiering approach, using an accreditation process to create a national portfolio of high performing Destination Management Organisations that meet certain criteria. I would also suggest a move away from the confusing 'DMO' term and call these nationally accredited Tourist Boards.

Recommendation 2a: The national portfolio should then be split into two tiers – a top tier of accredited Tourist Boards acting as 'Destination Development Partnerships' or as leaders of them (these could be described as 'hubs') and a second tier of accredited Tourist Boards acting as members of these Partnerships ('spokes').

Destination Development Partnership status could be awarded to either an individual accredited Tourist Board covering a large enough geography (e.g. a city region) or to a coalition of willing accredited Tourist Boards within an area that come together under a lead Board.

Recommendation 2b: The Government should then provide core funding to each Destination Development Partnership. The funding should be focused on activities that ensure their destination remains sustainable, competitive and responsive to high level strategic challenges identified by the Government such as those around sustainability, skills, inclusive tourism and levelling up. The Destination Development Partnership would be expected to pass down a degree of funding to accredited Tourist Boards amongst its coalition and work collaboratively with them to deliver a shared vision.

Recommendation 3: DMOs that do not meet the national accreditation criteria should be automatically considered as part of a 'third tier'. These are likely to be small, localised Destination Marketing Organisations and the Government should minimise its engagement with them.

123. **I have deliberately presented these recommendations together as they interlink and should be considered in the round.** At the outset I should note the key point that a nationally accredited Tourist Board could be either the leader of a Destination Development Partnership or a member of one. To illustrate this point, I'll use the example of the North East, following feedback from participants at the North East Roundtable about the willingness of DMOs in that area to collaborate. Under my recommendation Newcastle Gateshead Initiative, were it to fulfil all the relevant accreditation criteria, could end up badging itself as an accredited Tourist Board, and leader of the North East Destination Development Partnership.[30] Visit County Durham might also badge itself as an accredited Tourist Board and also describe itself as a *member* of the North East Destination Development Partnership. The Alnwick Tourism Association (Visit Alnwick), which concerns itself for the most part with tourism promotion, would continue to do so, but without being accredited.

[30] Recommendation 4 sets out my views on who should do the accreditation.

Tiering

124. **Support for a tiered approach to labelling and structuring DMOs was a consistent feature across all the evidence gathered.** A greater distinction between marketing and management was a particularly strong request, and many representations were received citing the National Portfolio Organisation model adopted by Arts Council England as one that could be mirrored for DMOs. A plea for some degree of coherence and structure, without eroding what works well, came from all sides – DMOs, National Parks, politicians and representatives of all levels of government, businesses and so forth.

125. **At the top of the tier would be individual accredited Tourist Boards, or coalitions of them, acquiring the status of a Destination Development Partnership**. Destination Development Partnerships must be built around a proposition and destination that makes sense to the consumer. I see these as being 'hubs' and would expect them to cover the whole of England. At a minimum level they should be the size of a county or city region, but they could conceivably cover a larger region. There are already a number of regional coalitions, of varying purpose and structure, in operation such as Visit East of England. However, this is not a case of going back to the past model of Regional Tourist Boards. In some parts of the country, like the North West, it's not going to be possible anymore for the likes of Manchester and Liverpool to join together under one big coalition – they have both proven over the last decade that they are powerful brands in their own right, capable of packing the kind of punch I would like to see from the top tier.

126. **Destination Development Partnerships should receive multi-year core funding from the central Government to undertake specific activities.** These activities should include:

- **Developing a Destination Development Plan**, outlining regional priorities for the visitor economy in the area covered and addressing Government priorities as well as the themes outlined in the UK Government's Tourism Recovery Plan such as:
  - **Regional growth** (with tourism growing across a region rather than just in the honeypots, with visitors staying longer and spending more)
  - **Levelling Up** (encouraging dispersal to lesser-known destinations; promoting sector employment)
  - **Destination sustainability** (visitor management, encouraging positive and avoiding negative environmental impacts, conservation of England's cultural, natural and historic heritage)
  - **Productivity** (providing longer-term skills and careers, addressing seasonality, improving digital and transport connectivity)
  - **Accessibility/inclusion** (attracting more diverse audiences, improving accessibility across the area)
  - **Targeting key international markets**
  - Encouraging **inward investment** in the visitor economy
- **Advocating for the destination's visitor economy.** The Partnership would be responsible for ensuring the visitor economy is integrated into wider economic strategies, for advising on infrastructure developments such as transportation proposals or new attractions and for encouraging inward investment into visitor economy sectors. The Partnership would act as the main conduit of information between the national Government and more local DMOs.
- **Partnership working.** The Partnership would be expected to work particularly closely with accredited Tourist Boards within their area, and would need to engage all relevant partners (including local government, Local Enterprise Partnerships, universities, commercial businesses, cultural organisations) in the development of their Destination Plan.
- **Bidding for funding / advising on funding bids.** I would expect the Partnership to work with accredited Tourist Boards in bidding for funding opportunities made available by the national Government. Recent examples of funds that might be appropriate include the Towns Fund and

the Discover England Fund. If another party was a more appropriate bidder, such as the District or County Council (e.g. for something like the Levelling Up Fund), I would expect the Partnership to advise on any bid with relevance to the visitor economy.

- **Product development.** I would expect the Partnership to drive regional tourism product development, working with accredited Tourist Boards, other stakeholders and potentially other Partnerships to provide a cohesive visitor offer in the form of travel itineraries, integrated transport passes, new visitor experiences, and so forth. The Discover England Fund offers a strong platform for this in every region of England, and has been a catalyst for collaboration across the visitor economy.
- **Engagement on major events or projects.** The Partnership should act as a champion for bringing major events – business, cultural, sporting and so on – to the region. They could also advise on the application of major national events to the area's visitor economy, such as the forthcoming Festival 2022 or the Queen's Baton Relay for the Commonwealth Games. They could provide strong support to bids for opportunities such as the UK City of Culture competition. They should be expected to work closely with MeetEngland at a national level to share and service event enquiries, ensuring these remain within England rather than being lost to competitor countries. There is no room for a parochial outlook across the DMO landscape.
- **Data collection and sharing.** The Partnership would be expected to collect and analyse data on the visitor economy, acting as centres of excellence, working with VisitEngland to ensure a robust and consistent approach. They should be able to articulate crisply the area's volume and value in terms of visitor spend, number of jobs supported by the visitor economy and its wider impact. The Tourism Data Hub referenced in the Tourism Recovery Plan (and referred to in Recommendation 6 below) could help with this.
- **Business support.** As part of their advocacy and information-sharing remit, and working in partnership with accredited Tourist Boards, Partnerships would be expected to inform the development of and encourage participation in VisitEngland business support initiatives (such as Taking England to the World or the TXGB business to business platform), as well as source and share wider skills and development opportunities for businesses.

127. **In the second tier would be a range of accredited Tourist Boards, all members of a Destination Development Partnership.** To become accredited, a DMO would need to meet certain criteria, which should be set by the National Government; VisitEngland would be well placed to assess and award accreditation. If a DMO is unable to demonstrate the criteria or does not wish to then they would not be able to receive the accreditation. Criteria might include:

- Being able to demonstrate the resources and performance history to deliver the Destination Development Plan led by the Partnership under which they would sit.
- Having strong existing connections to commercial sector partners and wider regional bodies such as LEPs and universities.
- Having a coherent and compelling visitor offer and brand narrative, and a strong track record of promoting it to domestic audiences.
- Being able to roll out and signpost business support programmes
- Understanding the needs and opportunities of their local visitor economy, and being able to advise on planning decisions and events in response to these.
- A commitment to sharing intelligence with their Partnership, and working in collaboration with them.

128. **In the third tier would be the remainder of unaccredited DMOs, which I largely anticipate as being those with primarily a marketing focus.** These organisations have their place, clearly as they continue to exist with the support of local businesses, but there has got to be a formal distinction between management and marketing. I do not think small, local Destination Marketing Organisations have the capacity, scope or, in some cases, desire, to carry out work to support the national

Government's overall tourism policy, nor do they have the heft to really drive forward a destination's visitor economy across all its facets. It is the case across the world that local, marketing-focused DMOs are largely left to their own devices and I think it's fine for that to be the case in England too. These DMOs could always aspire to become an accredited member of the national portfolio and achieve official Tourist Board status and the Destination Development Partnership sitting above them could nurture them to reach this stage. It may also be the case that some of these organisations wither, as businesses gravitate towards accredited Tourist Boards.

Figure 8: Approximation of current incoherent DMO landscape

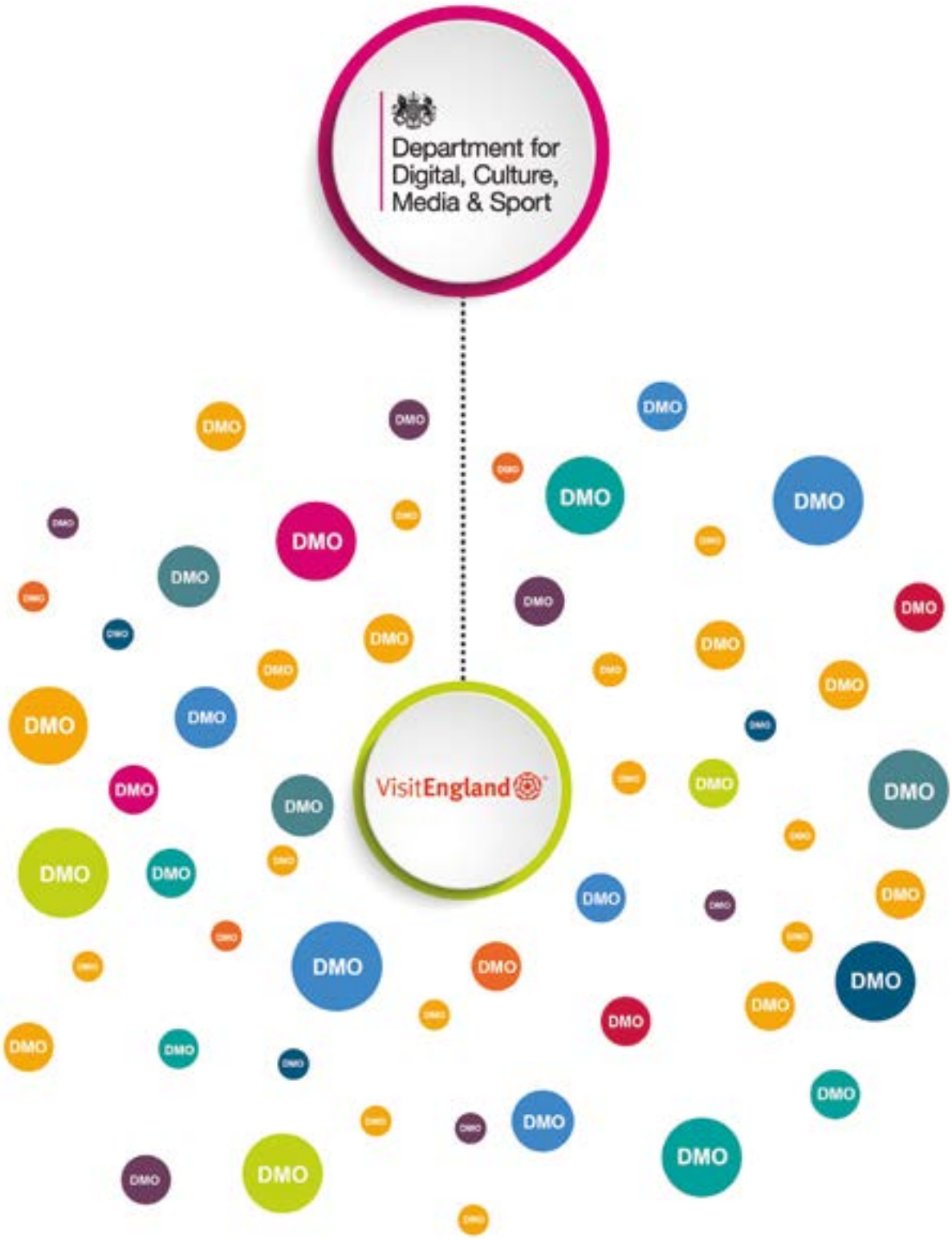
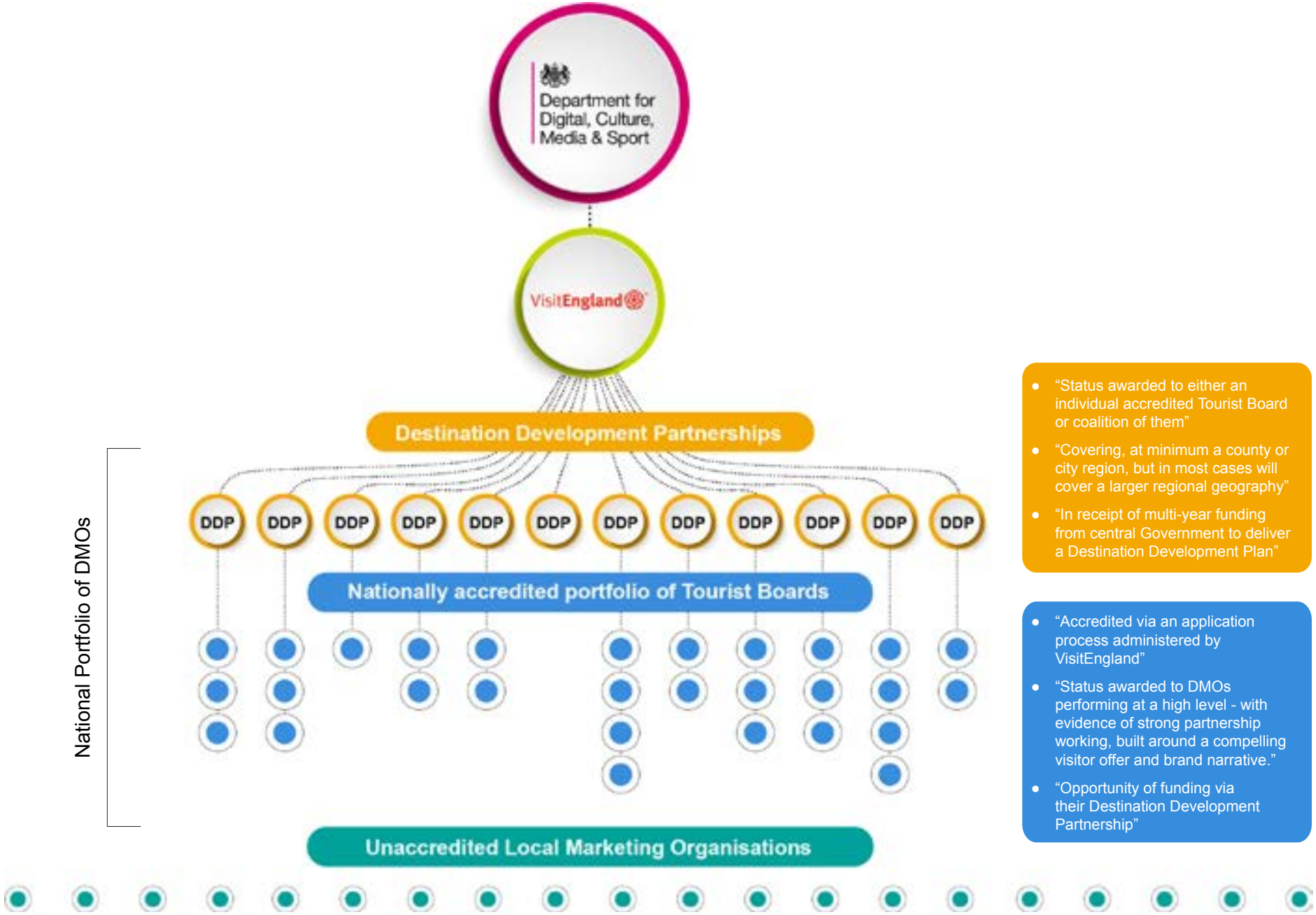


Figure 9: Approximation of what the DMO landscape would look like under my proposals



How my tiering proposals would work in practice

Funding

129. **I envisage Destination Development Partnerships being able to receive multi-year core funding as a grant from the central Government in order to deliver the activities I outline above.** In Recommendation 4, I set out why I think this should be accessed via an application process administered by VisitEngland. As part of the process, I would expect the Partnership to demonstrate an ability to secure commercial sector funding and for Local Authority funding to continue, albeit more likely on an ad-hoc project basis. I do not think the core funding should be able to be used for marketing activity; this should come from the commercial sector. Funding settlements would need to be multi-year, three at a minimum, to give certainty and reflect the time it takes to develop destinations and tourism products.

130. **I do not envisage a direct *core* funding relationship between national Government and the second tier of accredited Tourist Boards**, but I certainly envisage the Destination Development Partnership allocating a portion of its funding to the accredited Tourist Boards that make up its membership, if doing so was appropriate in order to deliver the Destination Development Plan in collaboration. A similar handing down of funding occurred under the old Regional Development Agency model. Ultimately I see the funding from the central Government as a means of shoring up the foundations from which the lead Tourist Board for the Partnership and the accredited Tourist Boards sitting within and beneath it can build on and leverage to reach their full potential.

131. **It would be for the Government to determine the amount of funding to provide each Partnership, should it agree to implement my recommendations.** The amount given should be as needed to deliver the objectives outlined above. In the main I expect this to be staff costs, e.g. a DMO bringing in someone to proactively go after event leads, engage the international travel trade or be focused on developing business skills, but there will also be other costs for running events, upgrading back office systems and so forth. The Government will need to devise an equitable formula that allocates funding fairly to each Partnership however. I do not think it is the case that each Partnership will end up getting the same amount, as each will cover geographies of different sizes and have different challenges. The Government may then wish to consider discrete challenge or project funds that Partnerships can bid into, akin to the Discover England Fund.

Bidding and accreditation process

132. **Acquisition of Destination Development Partnership status should be achieved via an application process administered by VisitEngland.** I would expect DMOs to self-select their geographical footprint, given how vital it is for DMO structures to be built around the consumer and the importance of local knowledge in determining that. However, there should be a minimal size expectation of roughly county/city region size, a push for regional coalitions, and the economic value of the local visitor economy should also be a factor. It was apparent to me over the review, particularly during the regional roundtables, that there was a lot of appetite in a number of areas for strong regional coalitions of DMOs with their horizons set beyond just marketing. But it was also apparent that a number of areas, particularly the city regions, felt they had effective attack brands and identities that could be diluted through collaboration. The flexibility I've proposed recognises this, and mitigates a 'one-size-fits-all' model that would be sub-optimal. Fundamentally Partnerships should sit at the biggest logical geography and I would anticipate a maximum of between 20 and 25.

133. **I would expect VisitEngland to ensure that there is minimal geographical overlap in responsibilities between Partnerships.** They should also seek to ensure full coverage of England, and push bidders to consider expanding their geography if areas are uncovered: for example a city might be asked to expand to cover an entire city region. From a visitor perspective, I would be keen to avoid introducing 'hard borders' between Partnerships. There will likely need to be a degree of 'fuzzy borders', but designed in such a way as to reduce any parochialism and encourage collaboration between Partnerships, for example in product development.

134. **Transportation hubs should be a key consideration in any Destination Development Partnership.** Transport infrastructure and connections are vital components of the visitor economy. Airports, for example, can be important contributors to DMOs as they understand that a strong visitor brand with international appeal will increase their own business.

135. **Whilst VisitEngland would be well placed to design a framework for what an accredited Tourist Board might look like, they may not be the best body to actually accredit these organisations.** The Government would need to decide who is most appropriate to conduct this role. It may be that the Destination Development Partnership accredits Tourist Boards based on a nationally consistent framework. I anticipate there being around 40 accredited Tourist Boards making up the national portfolio. I consider it essential that there would be a focus on consolidation during this process. Taking Devon as an example – as one of the most fragmented parts of the country – I would not want to see Visit Devon, Visit Exmoor, Visit Dartmoor, Visit South Devon, Visit Totnes, the tourism department of Exeter City Council, Destination Plymouth and so forth all receive accredited status.

Governance and accountability

136. **I would anticipate Destination Development Partnerships having governance arrangements that fully reflect their regional economies.** Fundamentally, the provision of government funding necessitates the need for a structure that can be held to account for how that money is spent. Key partners will include local government, relevant Local Enterprise Partnerships, universities, cultural and heritage organisations, National Landscapes and so forth. Representatives from accredited Tourist Boards within the geography should also play a role. It will also be critical that there is no opportunity for Partnerships to become inward looking talking shops for DMO professionals and local government agencies. I believe the best method of ensuring that is to have at least 50% of the main governing board made up of private sector representatives to ensure this critical voice is represented.

137. **Destination Development Partnerships would need to be held to account for delivery.** VisitEngland should administer the process and they should also be responsible for monitoring and assessment. Target outputs, outcomes, and Key Performance Indicators for measuring progress against these would need to be included in any plan and could include quantitative measures around increasing visitor spending, accommodation occupancy all year round, visitor dispersal, visitor satisfaction and business engagement in sector training or skills programmes. Both Partnerships and accredited Tourist Boards would need to recognise that what is awarded could also be removed if these outputs are not delivered to time, and public money is not used effectively.

Advantages of a tiering system

138. **The approach I suggest seeks to strike a balance between bringing a degree of coherence and structure to the English DMO landscape, whilst also avoiding the imposition of an inflexible 'one size fits all' approach from the top down.** It would provide the national Government with a smaller, more strategic and more accountable group of DMOs with which to work, and would start the process of pointing them in the same direction. The Government focuses on the top tier. Over time I think it would reduce the number of DMOs operating by reducing churn in the system, putting existing DMOs on a more sustainable funding footing and thereby reducing the openings available and incentives for new DMOs to form. My hope is that the proposals would be able to fully unlock the potential of those DMOs that understand destination management is about more than just bringing the visitor into a place and that tiering would encourage gravitation towards those with accredited status.

139. **This is not about creating a new bureaucracy.** It became clear to me over the course of the review that whilst the current landscape is not one anybody would have designed, we could not start afresh either. My aim is to recognise and build on what works well hence why I have not recommended that the Government creates new DMOs or an awkward, forced arrangement whereby they would be embedded in local government. I believe the recommendations are in keeping with best practice internationally, and what was reported throughout the review to have worked well in the past, without

turning the clock back completely. The emergence of city regions as strong 'attack brands' is one reason why we cannot just go back to Regional Development Agencies and Regional Tourist Boards, as is the emergence of Local Enterprise Partnerships and Mayoral Combined Authorities. However, I do think the English landscape has lost something in no longer having the regional role that these used to fill and what I am trying to do ultimately is set up a series of DMOs of appropriate size and statute to pack the most substantial punch.

140. **The proposals should help drive up collaboration, efficiency and accountability.** There would be a clear flow of strategic direction – from national Government to VisitEngland, then to Destination Development Partnerships and down to accredited Tourist Boards within the national portfolio. It is entirely plausible that the Partnership could run all back office functions for the accredited Tourist Boards within its area, building on good developments we've seen along these lines in recent years such as in Bath/Bristol and the East of England. This could also include investment in digital technologies that would otherwise be difficult to achieve without economies of scale.

141. **A clear, robust accreditation process would help DMOs fulfill their potential as champions, advocates and leaders for their visitor economy.** Organisations such as the Arts Council, Historic England and Local Enterprise Partnerships would have a single point of reference for collaboration, advice and insight. Businesses and consumers should also experience greater clarity. Commercially a Destination Development Partnership also helps answer the question posed by larger businesses in the sector, such as airports, train companies or large hotel chains, of 'who do I speak to?'; these businesses do not want to manage relationships with multiple organisations across a relatively small geographical landscape.

142. **DMOs would now know what the Government wants from them, and the Government will gain a valuable network through which it can confidently deliver tourism policy.** But this will only be the case if the Government is willing to support the proposals with funding for the sorts of activities I outline (whilst also insisting that other activities, like marketing, be funded from other sources). Put bluntly, the Government is not going to get 230,000 tourism businesses engaging in the Net Zero agenda without acting through DMOs but unless the Government is willing to recognise it has a part to play DMOs are not going to lean in to their agenda. Fragmentation will persist and DMOs will remain overly focused on their members' priorities. Furthermore, the Government has promised as part of its Tourism Recovery Plan to consult on a Tourist Accommodation Registration Scheme in England. This is a good example of something that the current DMO landscape would struggle to deliver successfully, due to its overall lack of consistency and comparable performance from area to area.[31] I note that in other policy areas there are similar networks to what I am proposing that the Government has at its disposal and uses, such as the Growth Hub network or National Portfolio Organisation model deployed by Arts Council England.

143. **Nothing in the new structure would prevent individual DMOs or Partnerships working together on areas of shared interest, i.e. developing a touring itinerary.** Indeed, I expect that the new structure would encourage this kind of partnership working across England, since Partnerships would provide a clear channel through which to initiate and continue it. If two or more Partnerships felt that collaboration on a project might be of mutual benefit to both, then they could do so and pool some of their budget to fund it. We have seen good examples of this sort of collaboration in recent years through the Discover England Fund, such as the England Originals project bringing together historic cities on a thematic basis or the Growing Manchester as a Gateway project which connects DMOs across the North.

144. **Further, there is nothing in the proposed structure that would restrict DMOs from engaging in other activities.** We've seen in places like Manchester and London that the DMO is part of a wider organisation dealing with matters such as inward investment outside the visitor economy, promoting universities and so forth. My intention is that the proposed new structure would only make such activities easier to carry out, and as such are to be encouraged.

[31] It would also have the benefit of significantly improving a destination's understanding of all the accommodation businesses in its destination – meaning a better evidence base and ability to engage with them.

145. **By bringing in a source of sustainable funding I would hope to free DMOs from constantly chasing money in order to ensure their survival.** With a degree of certainty as to budget at the beginning of each financial year, DMOs would have the breathing space to enable staff to focus on all aspects of destination management, to tackle the barriers holding the destination back and to ensure the destination remains competitive and sustainable. It would enable them to attend to the destination in its entirety, not just to the interests of the highest paying members. The pandemic has also highlighted the fragility of an entirely, or almost entirely, membership fee based model and this could be the case for some time as businesses rebuild their resources.

146. **Finally, I do think it is important to move away from the 'DMO' acronym**. 'Tourist Board' is one option but I am not wedded to it. It is a phrase that already exists in common parlance and it is used to describe VisitEngland/VisitBritain at a national level. Its main strength, as far as I'm concerned, is that it would give policy makers and the public a much greater sense of what the DMO is and does, although I do appreciate it has a somewhat archaic and stuffy feel.

Recommendation 4: As it is England's National Tourist Board, with the statutory responsibility for growing tourism at an England level, the Government should charge VisitEngland with responsibility for creating, maintaining and supporting this new tiered structure. It should receive sufficient funding and resources to do this.

147. **The proposed tiered approach will require significant effort to put in place and oversee. In my view, VisitEngland is the best positioned body to lead this.** VisitEngland is the trading name of the English Tourist Board. Its powers and functions are set out in the Development of Tourism Act 1969, and include all that would be needed to deliver the proposed framework. VisitEngland staff have the expertise needed to oversee the proposed structure, as well as the most applicable statutory duty – in their case it is encouraging the growth of English tourism. No new legislation would be needed to put the new structure in place, which is welcome so as to ensure their speedy implementation. However there is a case to be made that over time these changes could be embedded in law so as to ensure a longer term period of stability for tourism and the DMO landscape, by making it harder for a new administration to cancel the programme.

148. **The proposals would benefit VisitEngland.** As written evidence demonstrated, there are far too many DMOs at the moment for VisitEngland to engage fruitfully with. The consistency and standardisation of a tiered structure would enable VisitEngland to engage with those most relevant to their own objectives, and all DMOs would know where they stand relative to one another. VisitEngland would be able to double down on the successful engagement they have had with DMOs over the course of the pandemic, through schemes such as Good to Go.

149. **Nevertheless, the Government should not expect VisitEngland to deliver and support the new tiered system from within its current resources.** Under its current budget, it is largely limited to a business support and research/analysis role. Once these valuable activities, such as running quality assessment schemes or the Great British Tourism Survey, are accounted for there is not much left. A consistent theme across all consultees was a sense that VisitEngland is underfunded and under supported relative to Scottish and Welsh comparators, and has been so for some time. There is merit in this – VisitScotland's annual report and accounts for 2020 show it got a resource grant-in-aid from the Scottish Government that year of £54.36m[32] whereas the equivalent for VisitEngland for 2019-20 was £14.9m (with £5.45m of that for the Discover England Fund which has subsequently been discontinued).[33] There was a recognition that VisitEngland could not play the national coordination and leadership role for which DMOs are crying out, because it is not currently resourced to do so.

[32] See page 55 of: https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/annual-and-corporate-reports/annual-report-2020.pdf

[33] See page 28 of: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/945843/CCS001_CCS0620685730-001_BTA_ARA_2019-20_Web_Accessible.pdf

150. **The government should therefore ensure that VisitEngland has the budget to play its part in delivering this new framework.** By this I do not just mean the process of administering applications for accredited Tourist Board and Destination Development Partnership status and then monitoring and evaluating. There are other ways in which VisitEngland could add value. In particular, VisitEngland could provide the means by which best practice across the country is shared and discussed, they should be playing a lead role on ensuring standardisation in data and evidence, and they should be the go-to source for advising on articulating the Government's tourism policy and priorities for England. The VisitEngland business events team could also support Destination Development Partnerships by acting as a central bureau for event enquiries, information and referrals, and by collaborating on a strategic plan for winning events in England.

Recommendation 5: The Government must also change its approach, in order to maximise the success of the new system. There is currently insufficient appreciation of the importance and promise of the visitor economy at the top of government, leading to unfilled potential in DMOs and the wider tourism landscape. In practice, responsibility for tourism policy cuts across multiple departments, creating a confusing picture. Practical measures to address these issues could include elevating the Tourism Minister to a Minister of State position and either reallocating responsibilities from other departments to sit under that Minister or making the Minister responsible for the activities of teams within multiple departments – this latter suggestion is an established practice already in other policy areas which cut across Whitehall departments.

151. **There was a strong sense throughout the review that tourism is not given the prominence it deserves by the UK government (of all colours).** This sense came from former Tourism Ministers, DMOs themselves, businesses and others. In particular, it was felt that tourism and the visitor economy more generally was taken for granted – an industry that will grow by itself and does not require government intervention. That mindset has to change across the Government.

152. **COVID, however, has helped focus minds.** The impact of the pandemic on the visitor economy has been significant and interventions such as the VAT cut and the furlough scheme have been crucial. The Government's recently published Tourism Recovery Plan is a promising development, as is the decision to commission this review, and I think the Government understands that if it wants to maximise tourism's contribution to the levelling up and sustainability agendas it has to be more 'hands-on'.

153. **However the sector needs to hold the Government's feet to the fire.** Whilst the current Tourism Minister was widely praised by contributors to the review for his handling of the pandemic, many noted he was one of four in recent years – which the sector has taken as a sign about the seriousness with which they are viewed. I have already referred to the paucity of the VisitEngland budget compared to Scotland's, and similar comparisons can be made between VisitBritain's budget and its competitor tourist boards, for example Tourism Ireland spends double what Britain does in the USA. Many contributors praised the 2019 Tourism Sector Deal as an important development, but noted there was limited funding attached to it and that some headline proposals, such as Tourism Zones, had not been implemented.

154. **Although the DMO landscape can be confusing, who is responsible for what in Government when it comes to tourism policy can be confusing too.** Just as it is hard for a tourism business to know who they can pick up the phone to in the current fragmented landscape, it can be hard for DMOs to know where to go in Government if they want to impact tourism policy. Whilst 'tourism' currently sits within DCMS, responsibility for the policy levers affecting tourism policy are spread far and wide across Government – the Treasury leads on taxation, the Home Office on visas, the Department for Transport on all forms of transport and inbound travel, the Department for Business on consumer protection… the list goes on. The Minister responsible for tourism does not control many of the policy levers. As a practical step to make it clearer who is responsible for what, the Government should consider bringing together teams with responsibility for tourism policy together under one Minister. It was interesting to see both Scotland and Wales recently move responsibility for tourism policy into new departments. One model might be the Cities and Local Growth Unit, which spans two Departments and co-locates policy

teams responsible for economic growth. The Tourism Recovery Plan's stated intention to create an inter-Ministerial group for Tourism is a welcome proposal but in my experience not enough on its own to meet the challenge of cross-departmental collaboration within the national Government; there needs to be a structure of officials sitting beneath it with clear lines of accountability to deliver Ministerial decisions.

Recommendation 6: In order to help DMOs and Local Authorities take decisions on how best to develop the visitor economy in their local area, the Government should improve access to quality data by introducing the proposed Tourism Data Hub as a matter of urgency.

155. **The Tourism Recovery Plan includes a commitment to explore the benefits of a Tourism Data Hub, first referenced in the Tourism Sector Deal in 2019.** As the Plan describes, such a Hub could help address the dearth of reliable and robust data found on the tourism sector throughout this review – particularly at a local and regional level. The Hub's intention to provide real-time data on consumer behaviour, bookings, and longer-term trends would be a massive game-changer. This in turn could be used to provide Destination Development Partnerships and accredited Tourist Boards with useful insights for planning their regional and local activities. With this in mind, the government should prioritise the development of such a Data Hub at the earliest opportunity.

Recommendations for DMOs

156. **DMOs themselves also have a role to play in addressing the barriers preventing the DMO landscape as a whole from fulfilling its potential.** Even though my main recommendations relate to the Government, it cannot just be left to them. The review raised a number of themes and issues that warrant critical reflection from those DMOs themselves that find themselves accredited. Given the torrid time tourism has faced since the pandemic began, it was heartening to find across the country a huge amount of passion and commitment from people working in DMOs. There is no shortage of enthusiasm, but that alone will not be enough to create the conditions that will allow regional tourism to recover and thrive.

Recommendation 7: DMOs must accept that they also have a role to play in driving forward change; it cannot just be left to the Government. To maximise the success of the new structure I have outlined, DMOs will need to take a less territorial approach, have a greater focus on collaboration, and recognise that the current fragmentation is holding them back from acting as effective advocates for the visitor economy.

157. **At the centre of this recommendation is my finding that the fragmentation and confusion of the DMO landscape does itself no favours.** A consistent theme across the review, whether I was engaging with public sector policy makers (at all tiers of Government) or private sector businesses, was that the DMO landscape was too opaque, duplicative without apparent good reason and overly confusing. Speaking as a former MP and Government special advisor, I know how important time is to public sector decision makers. The hard reality is that if something takes an age to explain, especially with a subject like DMOs where the benefits are not immediately visible to the general public, then it is going to switch policy makers off.

158. **One issue DMOs will need to address is that of geographical overlap.** Whilst I am generally all for competitiveness, I also recognise that intra-region competitiveness in particular can ultimately harm and hinder growth, especially when it overly dilutes a brand and presents confusion from the outside looking in. I lost count of the number of times I was told by people coming from all sorts of perspectives that there are currently 'too many' DMOs within England, 'too many' duplicating and that fundamentally consolidation is needed. I have not recommended that this be engineered by the national Government, with them deciding which DMO covers which area, because I do not think the Government is best placed to know what the right geography is in every part of the country and because local knowledge is so vital. However, I would expect the criteria for any national accreditation scheme to be designed so as to encourage collaboration and join-up. I also hope for a rationalisation

of the landscape to follow, with players across the visitor economy gravitating towards the accredited Tourist Boards and Destination Development Partnerships, and away from the unaccredited.

Recommendation 8: DMOs should seek to diversify their income streams, and should share and learn from examples of best practice. This will enable them to best leverage the core funding I propose and I would expect a commitment to diversification as being an accreditation criterion.

159. **The pandemic has exposed the fragility of the DMO funding landscape, in particular for those relying most heavily on commercial revenue sources like membership fees**. With this in mind, I would recommend that maintaining, growing and diversifying commercial income streams should be a key focus for accredited Tourist Boards. This could give them an extra string to their bow, and support the overall delivery of their strategic vision. If the Government does introduce a core funding approach for Destination Development Partnerships I would expect that this does not erode or detract from the commercial acumen and rigorous evidence praised as a core strength of many DMOs.

160. **The sector is awash with best practice on commercial income generation, and DMOs may consider some of the following as potential areas to look at:**

- **Commercial membership:** moving beyond a transactional relationship to a longer-term (even multi-year) model that builds a sense of 'belonging' among members, encouraging local collaboration and making renewal more likely.
- **Consultancy services:** for example, advising on planning applications and inward investment cases.
- **Training:** developing and running training programmes for businesses and wider stakeholders as necessary.
- **E-commerce and product sales:** using the VisitEngland led TXGB platform, which connects tourism suppliers to domestic and international distributors, to drive online sales of the region's product offering, bringing revenue directly to the organisation.
- **Product offering:** developing and selling consumer experiences (e.g. city walking tourism or running Christmas markets).
- **Acting as a film desk:** Film and TV tourism is a growing market segment for the UK and providing scouting and coordination services for filmmakers could prove a major opportunity area, with substantial dividends going forward.

161. **The new structure could help with commercial income generation.** For example, Destination Development Partnerships could consolidate back office functions across accredited Tourist Boards in their area, freeing staff up to do more proactive activities. Partnerships could also collate and share best practice and organise training for DMO staff. They could also consider providing DMOs with a degree of 'seed funding' from their Government grant to test innovative approaches.

Recommendation 9: DMOs should have a rigorous focus on keeping the skill sets and expertise of their own staff up-to-date, particularly with respect to digital skills, so as to ensure their destination's offer continues to be sustainable and competitive.

162. **The success of any new structure will rely heavily on accredited Tourist Boards and Destination Development Partnerships employing skilled staff, who have the knowledge and tools they need to ensure their destination remains competitive and sustainable.** It's clear that DMO staff are passionate and knowledgeable but I also found concerns with the supply of skilled staff (exacerbated by the pandemic) and an over reliance on particularly brilliant individuals. My hope is that the relevant Destination Development Partnership will allocate a portion of its funding to skills development within the accredited Tourist Boards themselves. In particular, there should be a focus on:

- **Digital skills** – if DMO staff are not equipped to maximise the potential of opportunities presented by emerging technologies such as Augmented and Virtual Reality and 5G then destination competitiveness could suffer. DMOs also need to understand how consumer decision-making and

consumption is shifting online, and should be just as comfortable with Tiktok and Tripadvisor as with creating paperback destination guides.

- **Selling internationally** – Through the Discover England Fund, VisitEngland has worked with DMOs to increase their knowledge and awareness of the international travel trade. Initiatives such as Taking England to the World could be looked at as a model for upskilling small and medium enterprises and the TXGB platform should be utilised to its full extent.
- **Promoting the industry** – DMO staff should also feel comfortable going into schools, colleges and universities to promote the tourism industry as a great sector for realising talent and growing a career, countering misguided preconceptions about the industry as being one just for jobs for the summer. There are some good examples of this already, for example the work undertaken in Liverpool engaging colleges in the city region.

Recommendation 10: DMOs should have more diverse boards that fully represent their communities as well as their businesses and visitors.

163. **Whilst not a dominant theme, I was struck that issues around the diversity and inclusion of DMO boards emerged as an area of concern in the anonymous written consultation exercise**. Simply put – the governance structure of a DMO should reflect the visitor economy it represents. That means reflecting both consumers and businesses and there must be a significant role for the private sector. Different perspectives can always add value, but particularly in tourism where you must look at a destination from the perspective of a visitor. I was struck by comments noting that whilst it's great that DMOs 'live and breathe' their region, this can sometimes blind them to a destination's shortcomings from the perspective of a potential visitor. DMOs should reflect on this recommendation and respond accordingly.

Recommendations for Local Enterprise Partnerships and Local Authorities

164. **My final set of recommendations focus on two groups that will be essential to the success of DMOs going forward, and which were much discussed over the course of the review.** I have focused on Local Enterprise Partnerships and Local Authorities as they quickly emerged as two key cogs in the wheel. As we have seen, for a DMO to be at their best they must be well integrated with bodies and organisations that hold levers associated with their plan for the destination. I do not think it is a coincidence that the DMOs which were regularly cited by contributors to the review as high performing are those working in sync with the Local Enterprise Partnership and the relevant Local Authorities.

Recommendation 11: Local Enterprise Partnerships must realise the value of tourism, ensure the visitor economy is fully integrated into their economic strategies and play their full role as partners in the activities of their local accredited Tourist Board and Destination Development Partnerships. They should recognise that DMO type organisations are best placed to drive growth in regional tourism and they should actively support them.

165. **I am aware that the Government is undertaking its own review of Local Enterprise Partnerships (LEPs).** I am not privy to the findings of that review, however. I am also aware that the Government intends to bring forward a white paper on levelling up and devolution later this year. As such, I have sought to be more general in my recommendations here, on the assumption that things might change.

166. **One finding is crystal clear to me though – wherever the Government ends up on LEPs, they should *not* recommend that they take on the functions of DMOs.** Some respondents advised me to align DMOs and LEP areas, but these were almost always DMOs that were closely integrated with their LEP and aligned geographically. I am not sure that the rest of the country aligns or works in this way. For example, from a consumer perspective it would clearly be ludicrous to build a DMO around 'Enterprise M3'. The foundation stone of any DMO must be what makes sense to the consumer. If that aligns with LEPs, great, if it crosses multiple LEP boundaries then that needs to be worked around. I think artificially fixing DMO boundaries to match LEPs would be a mistake. Similarly fixing LEP boundaries around DMOs would also be a mistake as LEPs cover more than just the visitor economy.

167. **The key point of LEPs is that they need to be more consistently engaged in the visitor economy.** The visitor economy is here to stay, makes a substantial economic contribution and employs millions. To an extent, I think the pandemic experience has woken LEPs up to its value, and there was evidence provided of LEPs that were really well engaged such as in the North East or in London where the LEP contributed £1m to the recent London domestic recovery campaign. However, the overwhelming message was of the visitor economy being underappreciated. For the reasons I have outlined, I think the complexity and fragmentation of the DMO landscape makes it harder for LEPs to engage, but this is not the only problem. Too many in LEPs tend to unfairly dismiss the sector as low productivity and low growth. However, one phrase that emerged during my engagement sticks in my mind – today's visitor is tomorrow's investor. One respondent provided evidence that for their county, 19% of future inward investors started as tourists. They liked what they saw when they came on holiday or visited as a business traveller and decided it was a place for them to build a business.

168. **The question is how to achieve this.** To an extent, I think that if the recommendations for Government are implemented, then this will greatly assist levels of LEP engagement. They will know who to engage with and what they can get, as there will be new Destination Development Partnerships advocating for the visitor economy with clarity. However, I would advise the Government when designing the scheme, and DMOs when bidding for it, to strongly consider the potential for 'cross-pollination' between the LEP and the DMO in order to ensure fully-integrated partnership working, and take the opportunity to eradicate any duplication or overlap within their own structures and committees.

Recommendation 12: Local government – be that a District Council, County Council, Mayoral Combined Authority or any other formulation – must also realise the value of tourism and should strive to play their part in supporting their accredited Tourist Board and Destination Development Partnership. They should accept that for DMOs to be at their best, they need to be public/private/community partnerships, not based solely in a Local Authority but working in close partnership with them. They should also involve their DMO in any policy decision-making affecting the visitor economy.

169. **For a DMO to be at their best, they must work closely with their Local Authority.** The reasoning is simple – the Local Authority holds a number of key policy levers that affect a destination. For example they can run a number of visitor attractions, will look at issues such as local public transport, roads or cleanliness and are important for engaging businesses on issues such as alcohol licensing.

170. **However, I do not think DMOs can be at their best if based entirely within a Local Authority.** As with LEPs, this runs the risk of a DMO that does not have the consumer front and centre and is therefore designed around artificial administrative boundaries rather than boundaries that make sense as a consumer proposition. Furthermore, a Local Authority led organisation may be overly bureaucratic, putting off engagement from the private sector, and becoming subject to changing political winds; there was much criticism of this during the review.

171. **I appreciate how difficult it is for Local Authorities to engage, especially with tourism not a statutory requirement, but I would strongly recommend they do not lose sight of the importance of the visitor economy.** In particular, where they do fund DMOs it is imperative that the funding isn't withdrawn following this review. The activities I am proposing be funded by the central Government are not intended to replace the sort of activities that Local Authorities are best placed to lead. My hope is that, should the recommendations be implemented, Local Authorities will have more clarity about what DMOs are and how they can work in partnership together. They should also have a very useful source of advice and intelligence when it comes to deciding how to use the policy levers they have which have an impact on the visitor economy.

Next Steps

172. **It is now incumbent on the Government to appraise the findings of my review and the recommendations and decide whether or not to proceed with them.**

Annex A: Terms of Reference

1. Purpose

This review aims to examine and assess how Destination Management Organisations (DMOs) across England are funded and structured, and how they perform their roles, in order to establish whether there may be a more efficient and effective model for supporting English tourism at the regional level, and if so what that model may be.

2. Objectives

The review will need to examine the extent to which the current DMO landscape:

- is economically efficient, effective and sustainable (with regard to funding, structure and performance)
- best enables the government to meet its leisure and business tourism policy objectives at a national, regional and local level
- engages within the wider local and regional economic landscape, and the current focus on English devolution and levelling up

Depending on the findings of this examination, the review will then need to make recommendations, to government, the tourism sector or both as appropriate, on:

- whether DMOs might be structured or funded differently, and if so how any proposals might maximise post-COVID-19 recovery and long-term success
- what the role of DMOs should be, bearing in mind existing other local structures such as Local Enterprise Partnerships, Mayoral Combined Authorities, local authorities and other similar local/ regional bodies; and where these might intersect
- how DMOs should best engage with, and be engaged by, VisitEngland, VisitBritain and DCMS, as well as wider government/public bodies where relevant (e.g. Arts Council England; UK Sport)

3. Scope

This independent review will produce a detailed examination of the DMO landscape in England, focussing on a) current funding models; b) organisational structures and c) performance levels (both in respect to before the COVID-19 pandemic ('the pandemic'), and since the start of 2020).

It will then try and establish whether the status quo is the most efficient, economically justifiable way of organising local and regional English tourism sectors, in order to maximise opportunities for supporting policy priorities on a local, regional and national scale, and, where relevant, internationally. These priorities include sector recovery, levelling up, and economic growth, as well as various local and regional priorities that are likely to differ from area to area.

Finally, it will then make recommendations on DMO structures, roles, funding model and engagement with other local and national bodies, based on the findings of the preceding steps. We anticipate that these recommendations could be for both the government at a national, regional, and local level, and the tourism industry.

The review will need to be placed in both a historical and an international context. This includes examining and evaluating the approach taken in England between 1999 and 2010, when regional promotion was carried out by government-funded Regional Development Agencies. It will also need to consider the tourism sector landscape in Scotland, Wales and Northern Ireland, as well as the approaches taken in comparator/competitor destinations globally.

The structure of the national tourism boards, VisitEngland and VisitBritain, will only be in scope of the review where it is relevant to the structures and funding of DMOs.

4. Stakeholder engagement

The review will aim to speak to as many of the estimated 150 DMOs in England as possible in the timeframe given, ensuring consultation with a diverse and representative spread of these organisations in terms of geographical location, size and nature of funding streams.

The reviewer will also need to engage with other local bodies/structures with an overlapping interest in the sector: these are likely to include Local Enterprise Partnerships, Mayoral Combined Authorities, where relevant, regional convention bureaus, and local authorities.

The reviewer will need to speak to a representative sample of tourism stakeholders. This includes commercial business representatives (e.g. hotels, attractions, event venues, hospitality venues etc), and wider organisations with an interest like heritage organisations, the National Parks, local transport bodies. This engagement will help to establish the views of wider stakeholders who have worked closely with DMOs both pre- and during the pandemic – as well as those who have not worked with DMOs before, or who may have started to do so only recently.

Finally, the reviewer will also need to consider the views of key stakeholder bodies in the sector, such as VisitBritain, VisitEngland and member bodies of the Tourism Industry Council, an industry-led board composed of representative organisations from the tourism sector that advises the Minister for Sport and Tourism. It may also consult wider Arm's-Length Bodies and Executive Agencies (e.g. Arts Council England; UK Sport) to understand local funding structures in place across government for other sectors (such as ACE's National Portfolio Organisations).

5. Governance

The review will be led by the current Chair of VisitEngland, Nick de Bois, acting in an independent capacity. Mr de Bois will receive administrative support from a secretariat based in DCMS. Mr de Bois will report directly to the Secretary of State.

In recognition of VisitEngland's independent statutory role to advise the Government on tourism in England, Mr de Bois will be able to draw on the advice, insight and expertise of staff working for VisitEngland during the review as required. However, the review will be considered independent and not the official view of VisitEngland. Wider VisitEngland employees and/or Board members will not be able to access any information that DMOs or other contributors share with the review team – including Mr de Bois in his independent capacity – during the consultation process. VisitEngland's response to the review will be compiled and signed off independently of Mr de Bois, before he formally considers it in his role as Review lead. The final report with recommendations will be delivered to the Minister for Sport and Tourism and the Secretary of State.

Mr de Bois will be able to convene an experienced advisory panel to assist him with his review. He will speak to people, organisations and destinations across England and more widely to gain a fuller picture of the country's diverse tourism industry (we currently envisage that this engagement will take place remotely, though there is the potential to explore a limited number of in-person meetings where deemed appropriate). The final report will draw on existing evidence and that submitted by interested parties during the course of the review to make recommendations to the government and industry.

Any recommendations would need to have regard to existing legislation, DCMS spending commitments and wider government policy, particularly the focus on Levelling Up our regions.

The response to the government recommendations will be led by the DCMS Secretary of State and the Minister for Sport and Tourism.

6. Report and timing

The reviewer will be tasked with conducting their review over spring 2021, before evaluating their findings and submitting a written report, including their recommendations, to the Secretary of State by summer 2021. The final report will be published on gov.uk and laid before both Houses. The government will respond to the review's recommendations in due course, with the response led by the Secretary of State and the Minister for Sport and Tourism.

7. Context

7.1 DMOs

Destination Management Organisations (DMOs) are a common feature of local and regional tourism landscapes worldwide, and play an important role in the English tourism ecosystem. There are an estimated 150 DMOs in England, although these vary substantially in terms of activity, size, geographical area covered, funding models, structure and the degree to which they work with both the central government and the British Tourist Authority (BTA, trading as VisitBritain and VisitEngland).

DMOs are not the only local/regional organisations involved in place-based tourism policy and promotion – Local Enterprise Partnerships (LEPs) and local authorities can also play a role, as can Business Improvement Districts. It is not a statutory requirement for local authorities to fund tourism.

It has been suggested that the sheer variety and number of DMOs can make local tourism coordination and collaboration at a strategic level, in support of government policy objectives, more challenging, leading to duplication of efforts or, worse, a lack thereof, with subsequent impacts on the productivity and competitiveness of country's tourism sector, even pre-COVID-19.

7.2 COVID-19

The government recognises that the tourism sector has been among the worst-hit industries by COVID-19 and that DMOs have been particularly hard hit, especially those reliant on commercial income. Many DMOs have been at risk of closure at a time when their business support role has become more important. At the same time, the government is aware that DMOs will have an important role to play in supporting the English tourism sector recover in the medium and long term, in line with government priorities around economic recovery and Levelling Up.

The pandemic has thrown issues with the current DMO landscape into sharper focus. So far, VisitEngland have made £2.3m available to support the survival of commercially reliant DMOs until March 2021, so that they remain viable to support government work on sector recovery. However, the government recognises that this is a short-term solution. The government also recognises that some DMOs have been forced to fold, while others have had to take cost-saving measures.

At the same time, the pandemic has highlighted strong examples of standardisation, collaboration and more agile working among DMOs.

7.3 Devolution in England

The government has set out a clear commitment to level up all areas of the country, and wants to devolve and decentralise to give more power to local communities. It intends to bring forward the Devolution and Local Recovery White Paper in due course, which will cover how the UK government will partner with places across the UK to build a sustainable economic recovery and set out our plans for future devolution arrangements. This work, combined with the fragility of the current DMO landscape, suggests now is a good opportunity to carry out a full-scale examination and assessment of the English tourism sector, to understand how it works currently and whether there is potential for it to work differently, in order to help strengthen the domestic sector through short and medium-term COVID-19 impacts, so that it can play a role in longer-term recovery.

Annex B: Methodology

Below I have provided further detail on the methodology I used to gather evidence for the review. In particular, I have provided further detail on the following:

- The one to one virtual meetings I held with stakeholders in March and April 2021.
- The online survey for DMOs, that ran between 24th March and 16th April 2021.
- The written consultation exercise, open to anyone, that ran between the 18th March and 4th May 2021.
- The nine in-person roundtable discussions I held in June 2021.

One-to-one virtual meetings in March and April 2021

I have provided a list below of who I met during my initial engagement. There was no set script or questions underpinning these meetings. Their primary purpose was to begin exploring the themes in the terms of reference, and to build my understanding of the DMO landscape and both its strengths and weaknesses. Common topics included what does and does not work well, why do we need DMOs, funding and fragmentation, the pandemic and examples of best practice – both within England and internationally.

Politicians

Andy Burnham – Mayor of Greater Manchester Combined Authority
John Penrose MP – former Tourism Minister
Tracey Crouch MP – former Tourism Minister

DMOs

Bury St Edmunds and Beyond
Cumbria Tourism
Experience Oxfordshire
Liverpool City Region Visitor Economy Board
London and Partners
Marketing Manchester
National Coastal Tourism Academy
Newcastle Gateshead Initiative
Visit Bristol/Visit Bath
Visit Cornwall
Visit East of England
Visit Herefordshire
Visit Isle of Wight
Visit Kent
Visit Lincoln
Welcome to Yorkshire
West Midlands Growth Company

Arms Length Bodies

Arts Council England
Historic England
VisitBritain and VisitEngland

Other

Association of Leading Visitor Attractions
Davies Tanner
Former Head of Tourism Policy at DCMS
Holiday Homes Association
LEP Network
Local Government Association
Mosaic Outdoors
Peak District, Northumberland and Exmoor National Parks
Tourism Alliance
Tourism Management Institute
Tourism for All

Online survey of DMOs, running between 24th March and 16th April 2021

The online survey was issued to 178 organisations taken from a list of English DMOs provided by VisitEngland. The survey was anonymous and asked a series of questions about size, structure, staffing, governance, membership, funding position, income streams and sector engagement.

In total I received 168 responses, of which 98 were completed and 5 were flagged as spam. Not every respondent answered every question and the average progress completed across responses was 75%.

Whilst the sample captured may not include each and every DMO in England, the total number of complete responses can be taken to represent a fairly accurate picture of the current landscape and I have felt comfortable in drawing conclusions about the landscape based on the survey.

Written consultation, running between 18th March and 4th May 2021

I wanted to make sure everyone had a chance to contribute their views as I knew that in the tight timeline available I would not be able to meet as many people as I would otherwise have wanted to. That is why I ran an online public consultation inviting responses from anyone. The consultation questions, along with the privacy notice associated with the data gathered can be found on gov.uk here: https://www.gov.uk/government/consultations/independent-review-of-destination-management-organisations-dmos-consultation

The consultation received 289 non-duplicative responses via the online portal, 18 via the DMO Review mailbox that I set up at the start of the process and 38 via other routes. In total there were therefore 345 submitted responses. Of these, 76 came from DMOs, 230 came from 'other organisations' such as tourism businesses, Local Enterprise Partnerships, Local Authorities or academics, and 39 came from members of the public.

My initial intention was to undertake analysis of the responses myself, in conjunction with the DCMS secretariat supporting me on the review, but the volume of responses received and the detail provided proved too substantial. DCMS therefore issued a tender inviting bidders to come forward to undertake the analysis. The contract was awarded to Llewellyn McLaren Consulting and they did a first rate job in turning around, in short order, a detailed report on the findings. I have drawn on it heavily in this document, and also deployed quotes submitted as part of the consultation.

Nine in-person sector roundtables in June 2021

The purpose of the roundtables were twofold – first to examine the key themes that had emerged from the initial stages of consultation and second to begin considering the policy implications for the Government. I wanted to make sure I was on the right track and also start thinking about solutions. Attendees for the roundtables were selected to ensure a broad spread of representatives – including DMOs, Local Enterprise Partnerships, Local Authorities, the private sector and academics. I worked with the Challenge Panel and DCMS Secretariat to develop a list of invitees.

Prior to the roundtables a short paper was issued to attendees introducing the key themes I had identified by that point, so as to serve as the basis of the discussion. There were nine themes in total and at each roundtable I spent half the session looking at two of the themes in detail. The themes were:

1. The huge variance in the size, model, and focus of DMOs across England means they are not as economically efficient, effective and sustainable as they could be.
2. DMOs do much more than just marketing. What should DMOs do, and how should this be supported?
3. Funding security is the number one problem identified by DMOs – agree?
4. The role of DMOs, and the importance of the visitor economy more generally, is poorly understood, leaving DMOs sidelined in decision-making.
5. Regional tourism is weaker because it has no top-down structure set nationally.
6. Why aren't Government priorities for tourism higher up DMOs' agendas?
7. DMOs are insufficiently integrated with wider local and regional economic structures to enable a fully coordinated approach to regional visitor economies.
8. How should DMOs be held to account?
9. Do major events (conferences, cultural/sporting events, filming etc) offer a missed opportunity for DMOs?

I have also listed below who the attendees were at each roundtable and its location.

East of England (Cambridge)

– Cambridge and Peterborough Combined Authority LEP
– Discover Newmarket
– Ely Cathedral
– Greater Yarmouth Tourism BID
– Knebworth House
– Shorthouse Russell Agency
– The Graduate Hotel
– Thameslink
– Visit Cambridge
– Visit East of England
– Visit Suffolk

East Midlands (Bakewell)

– Chatsworth Park
– D2N2 LEP
– Derby QUAD
– Derbyshire County Council
– East Lindsey District Council
– East Midlands Chamber
– Heights of Abraham
– Leicester and Leicestershire Place Marketing Organisation
– Marketing Peak District and Derbyshire
– National Forest Company
– Nottingham Castle Trust
– The Stay Company
– University of Lincoln
– Wicksteed Park

London (Greenwich)

– Greenwich Foundation for the Old Royal Naval College
– London and Partners
– Night Czar for the Mayor of London
– Royal Museums Greenwich
– South Bank Employers Group
– Visit Greenwich
– University of Greenwich

North East (Newcastle)

– Alnwick Gardens
– Arts Council England
– ASM Global
– Beamish Museum
– Newcastle Gateshead Initiative
– North East LEP
– North of Tyne Mayoral Combined Authority
– Northumbrian Water
– Northumbria University
– Sage Gateshead
– Visit County Durham
– Visit Northumberland

North West (Ribble Valley)

– ACC Liverpool
– Browsholme Hall
– Cumbria Tourism
– Jodrell Bank Discovery Centre
– Lake District National Park
– Liverpool City Region Visitor Economy Board
– Liverpool John Lennon Airport
– Marketing Cheshire
– Marketing Lancashire
– Marketing Manchester

South East (Portsmouth)

– Brighton Dome
– Coast2Capital LEP
– Experience Oxfordshire
– Gosport DMO
– Great Sussex Way
– Paultons Park
– The Hotwalls Studios
– Tourism South East
– Visit Hampshire
– Visit Portsmouth
– West Sussex+ DMO

South West (Tiverton)

– Brend Hotels
– Cornwall and Isles of Scilly LEP
– Great Western Railway
– National Trust
– Professional Association of Self-Caterers
– SS Great Britain
– South West Tourism Alliance
– West Dorset Leisure Holidays
– West of England Combined Authority
– Visit Cornwall
– Visit Exmoor
– Visit Devon
– Visit Gloucestershire
– Visit West
– Visit Wiltshire/Great West Way

West Midlands (Shrewsbury)

– Birmingham Airport
– Black Country Living Museum
– Canal and River Trust
– Culture Central
– Eat, Sleep, Live Herefordshire
– Ironbridge Museum Trust
– Marches LEP
– National Exhibition Centre
– Shakespeare's England
– Severn Valley Railway
– Visit Shropshire
– West Midlands Growth Company

Yorkshire (Hull)

– Discover Harrogate
– Castle Howard
– Hull City Council
– Hull and East Yorkshire LEP
– Make it York
– The Deep
– Visit Hull and East Yorkshire
– William's Den
– Wykeland

Annex C: Challenge Panel Members



David Curtis-Brignell MBE FTS

David started his career in local government working in British resorts. He then spent nine years at the English Tourist Board working alongside the Regional Tourist Board network and travel trade before moving into the commercial world, holding senior positions in global international hotel companies, travel and tour operators.

In 2015, he was invited by Visit Kent to set up the new DMO Visit Herts. He became Deputy CEO for the GoToPlaces group, working in Kent and Hertfordshire developing new projects, including "The Big Weekend".

David served two terms as Chairman of The Tourism Society, co-founding British Tourism Week and then chairing VisitEngland's English Tourism Week for ten years. In October 2020 he established Tourism Reimagined as a platform to support business recovery and is a frequent contributor to publications and an industry speaker. He was awarded an MBE for services to tourism in the 2020 Queen's Birthday Honours.



Michael Hirst OBE

Michael is Chairman of the UK government's Events Industry Board, established to grow the number of international business events held in the UK, and immediate past Chair and Executive Committee member of the Business Visits & Events Partnership, representing Britain's business and cultural events' industry. Michael serves on the Tourism Industry Council and is a director of the Tourism Alliance, the body that brings together all the major tourism organisations in the United Kingdom.

Michael was appointed an OBE in 2004 for his services to tourism in Britain and was awarded the 2013 Joint Meetings Industry Council Unity Award, recognising individuals who have made a significant contribution to the advancement of the international Meetings Industry. He was awarded the 2008 IHIF Lifetime Achievement Award for his distinguished career in hospitality, leisure and tourism.



John Hoy FRICS

John spent 13 years as the Agent & General Manager for the Knebworth Estate before leaving to join The Tussaud's Group – initially at Warwick Castle as Head of Operations and then General Manager of Madame Tussaud's London.

In 2003, he was appointed the first Chief Executive of Blenheim Palace, where he drove significant change until he left at the end of 2016. John now advises a number of heritage and leisure clients, including spending two years at Castle Howard as Chief Executive.

John sat on the VisitEngland Advisory Board from 2011 to 2019, and is currently the chair of Silverstone Heritage Limited and of the Culture and Visitor Economy Sub-Group of the Oxfordshire LEP.



Kate Kennally

Kate joined Cornwall Council in January 2016 after a decade as Chief Executive at Barnet Council. With a background in people services, she is passionate about improving the life chances of the people of Cornwall through economic growth and through empowering communities to get involved in the delivery of public services.

Kate has accelerated the transformation and improvement of Cornwall's Council services, with an emphasis on adult social care and delivering the conditions for inclusive growth beyond Brexit. This has resulted in a reconfiguration of roles and responsibilities within Cornwall, with public amenities devolved to local communities and the Council gaining new 'strategic' powers from the Government to deliver the infrastructure, homes, skills and jobs to create a more prosperous and sustainable Cornwall.



Frank Rogers

Frank was appointed Chief Executive of the Liverpool City Region Combined Authority in November 2018, having previously taken up the position of Interim Head of Paid Service in 2017.

Frank oversees the Combined Authority's work across a range of key policy areas including transport, strategic investment, housing and employment and skills.

In 2015, Frank was appointed as Merseytravel's Interim Chief Executive being confirmed in the permanent dual role of Chief Executive and Director General two years later, before taking up his current dual role leading the Combined Authority and Merseytravel. He joined Merseytravel in 2006, as General Manager.



Sarah Stewart OBE DL

Recently retired following a wide-ranging career in marketing and business development, Sarah was Chief Executive of NewcastleGateshead Initiative 2010-2019, a successful public/private partnership operating as a DMO for leisure tourism and business events and as an inward investment agency. During this time, NGI bid for and delivered major sporting and cultural events, including the Great Exhibition of the North (2018).

Her early career was with Procter & Gamble, Price Waterhouse and Sage Group plc and was followed by a successful freelance career. Former non-executive roles include Deputy Chair of Port of Tyne and International Centre for Life. Member of the VisitEngland Advisory Board (2011-2019). Sarah was awarded an OBE for services to the North East economy in 2016 and is now Chair of Gateshead College.



Nigel Wilkinson

Nigel has been Managing Director of Windermere Lake Cruises Limited since 2004. He is also Managing Director of Winander Leisure Limited, and Director of Winander Group Holdings Limited, Lakeland Motor Museum Limited and Rushbond plc.

Windermere Lake Cruises Limited carried over 1.6 million passengers in 2019, making it one of the most popular paid visitor attractions in England, according to the most recently published Visit England Visitor Attractions Survey. Nigel joined the Board of Cumbria Local Enterprise Partnership in 2017 and chairs its Visitor Economy Sector Panel and its Finance, Audit and Resources Committee. From 2007 to 2017, he was a director of Cumbria Tourism.



Kate Willard OBE

Kate is the Thames Estuary Envoy and chairs the Thames Estuary Growth Board. In addition, she is senior advisor to Esken and an independent consultant working on a diverse portfolio of infrastructure and growth projects. With a background in culture and creativity, Kate has lived and worked in Hungary, France and Belgium, as an independent regeneration expert with the European Commission on major transnational projects in employment, social cohesion and regional development.

Whilst living and working in Hungary, Kate also established the first UK-Hungarian cultural partnership trust, Brouhaha Magyarország and was CEO of the UK's first rural regeneration company (Rural Regeneration Cumbria). Kate is a Churchill Fellow and Fellow of the Royal Society of Arts (FRSA).



Baroness Laura Wyld

Laura Wyld's career has spanned business, public life and the voluntary sector.

Appointed as a non-executive board member of DCMS in 2020, she is also currently a non-executive board member at Ofsted and a freelance communications and strategy consultant.

She is a Member of the House of Lords and sits on the Public Services Committee, and was also a member of the Regenerating Seaside Towns Select Committee.

Annex D: Acknowledgements

A large number of people have made this review possible, enabling me to get it done in what was an extremely challenging timeframe.

First of all I want to extend my thanks to the small team of DCMS officials which has supported me throughout the review. They have provided the exemplary support, expertise and passion to help deliver this report that I have had the pleasure of witnessing in many other professionals across the tourism sector during this review. To have completed this task in such a tight time scale and under the conditions imposed during the pandemic I am very grateful to the personal efforts of David Martin, Xanthe Dennis and Jamie Haworth.

I also want to thank Anna Adrien, my Executive Assistant in my capacity as Chair of the VisitEngland Advisory Board, who has organised my diary and stepped in as emergency note taker, and also Edwin Poon at DCMS, who undertook the detailed analytical work on the quantitative data I gathered.

Second, I would like to thank those members of the Challenge Panel which I set up to help me make sense of all the evidence coming in. They have been a great help in acting as a sounding board throughout the process, informing opinion, probing and testing my recommendations, and participating in the series of roundtables across the country.

Third, I want to thank those DMOs and attractions which took the time to host me in-person, and to facilitate the series of regional roundtables I held in June. Organising large meetings is never easy, but doing so in a pandemic is even more difficult. It was great to be able to meet people in person again, and I am grateful to all the venues for facilitating that in a safe way.

Fourth, I want to thank Llewellyn McLaren Consulting, who DCMS commissioned to provide me with an analysis of the qualitative data I gathered through the written consultation exercise. Their work was first-rate, and done at breakneck pace.

Fifth, I want to thank Lord Mendoza for taking the time to meet me at the start, and near the end, of the process to discuss his experience of running an independent review.

Lastly, I want to thank all those who took the time to contribute, be that in one-to-one meetings with me, as respondents to the various consultation exercises I undertook or as attendees at the regional roundtables. The response from the sector to the review has been enthusiastic, engaged and substantive.

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August 2021



Plymouth Visitor Plan

2020 to 2030

Destination management and business plan

Plymouth
Britain's Ocean City

Plymouth Visitor Plan

2020 to 2030

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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.



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 and 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.

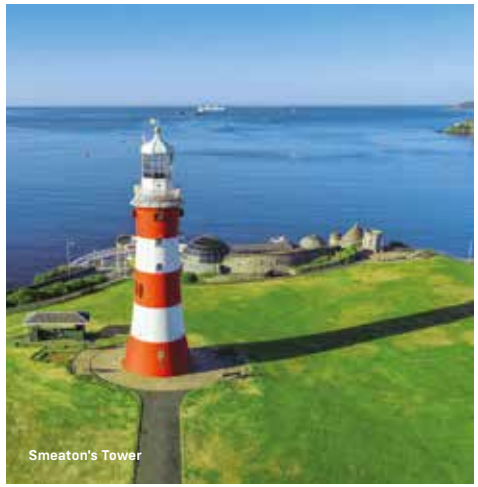
Around 5.4 million visitors make the trip to the city every year spending **£337 million** locally and supporting the employment of just under 8,000 people in the visitor and hospitality sector.*

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


Smeaton's Tower


Theatre Royal Plymouth

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 Plymothians. That means international and overnight leisure and business visitors who will visit throughout the year and manifests in our targets which grow value at a faster rate than volumes of visits. Delivering our refreshed Visitor Plan will generate a further 1,000 new jobs in the city over the next 10 years.[1]

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.


Tinside Lido


Mount Batten Watersports and Activities Centre



The Barbican and Sutton Harbour


National Marine Aquarium


Royal William Yard



The Blue Mile

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."


The Box



Theatre Royal Plymouth


British Firework Championships

2.0 Themes: Premier Destination

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

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


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

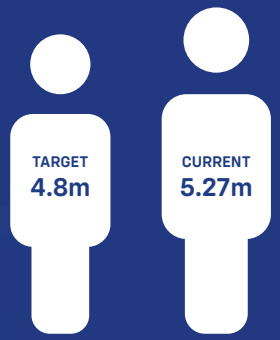
Tourism has been a great success story for Plymouth and it is anticipated that by 2020 we will have more than achieved our original 2011 goals which are set out below:

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



2019 Current total £334m ↑**22.3%**

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



2019 Current total 5.27m ↑**28.8%**

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



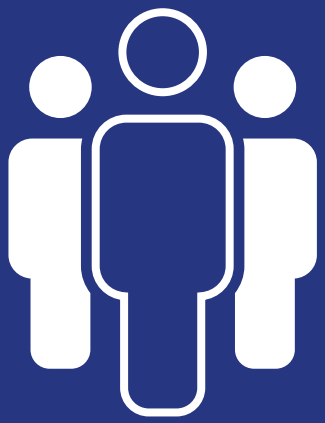
2019 GVA has grown by £53.2 million

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



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.

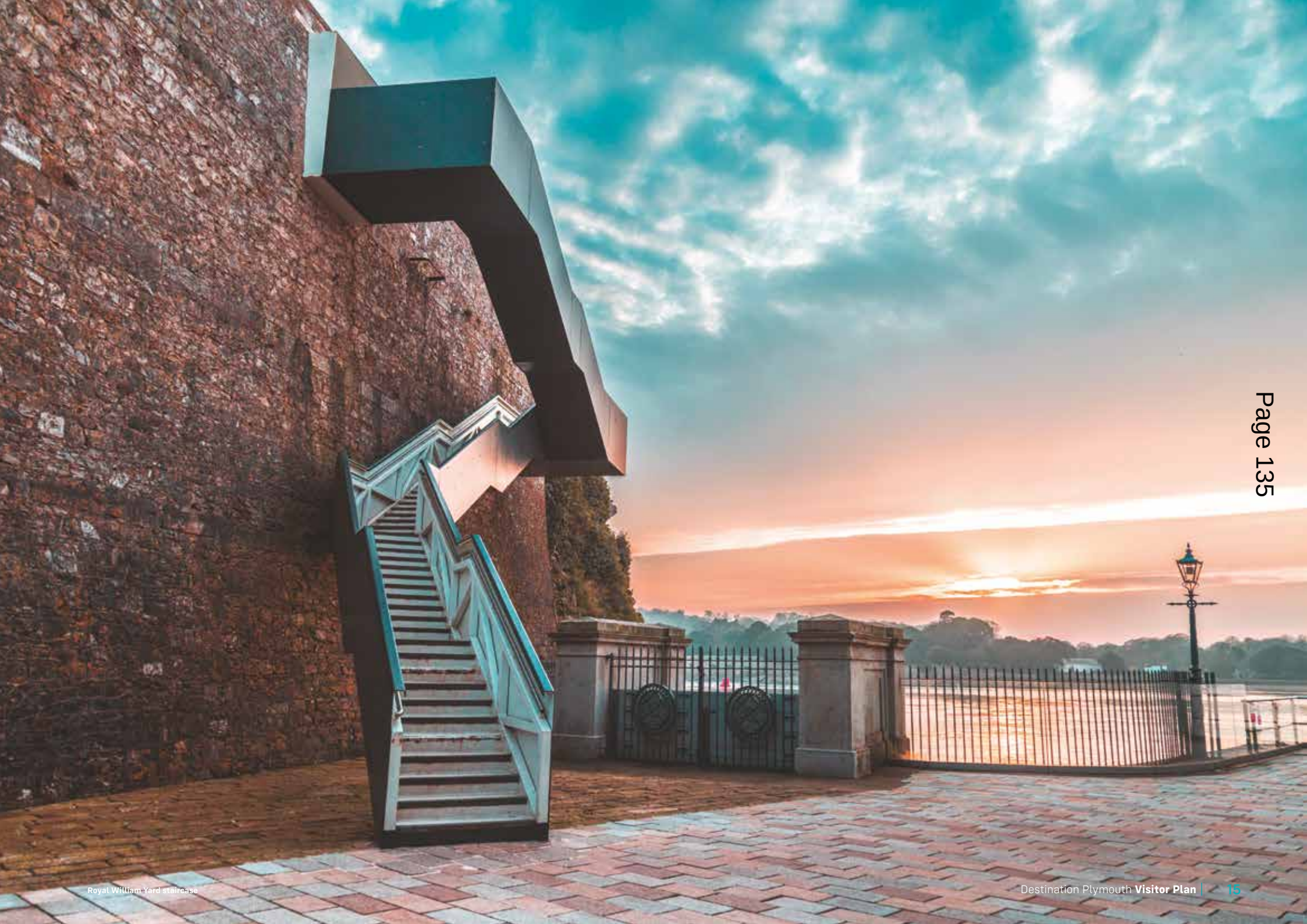
Destination Management

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 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.



Royal William Yard staircase

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. chefing 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 'Bienniale' 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


The Box

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



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..."



Partnership with Visit England



Britain's Ocean City branded train


Destination Plymouth Tourism Conference

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

Direct:	Indirect:	Induced:	Total:
5,242	1,673	888	7,985

Full Time Equivalent Employment (FTE's)

Direct:	Indirect:	Induced:	Total:
3,726	1,468	779	5,972

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.



City College Plymouth

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.


Plymouth Sound

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

PLASTIC FREE PLYMOUTH
PLYMOUTH'S PLAN FOR PLASTICS
FOR PEOPLE AND PLANET

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'.

MAKE A DIFFERENCE
SPIRIT OF
1620—2020
Mayflower 400™
MAKE A DIFFERENCE
MAYFLOWER MAKER


Mayflower Makers



Mayflower Makers

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



Plymouth Hoe

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


City College Plymouth


Sponge UK

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

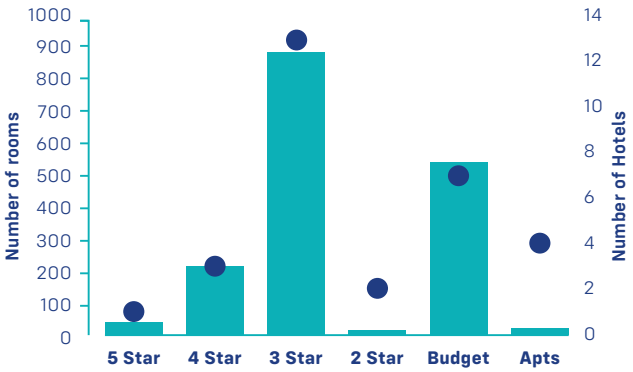
That means prioritising new hotels and conferencing facilities that create world-class quality and a distinctive offer including independent hotels and accommodation of character that become part of the Ocean City experience, for example on the waterfront or on the water. We will diversify our offer 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

5.0
Enabling
Priorities

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 a nd 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

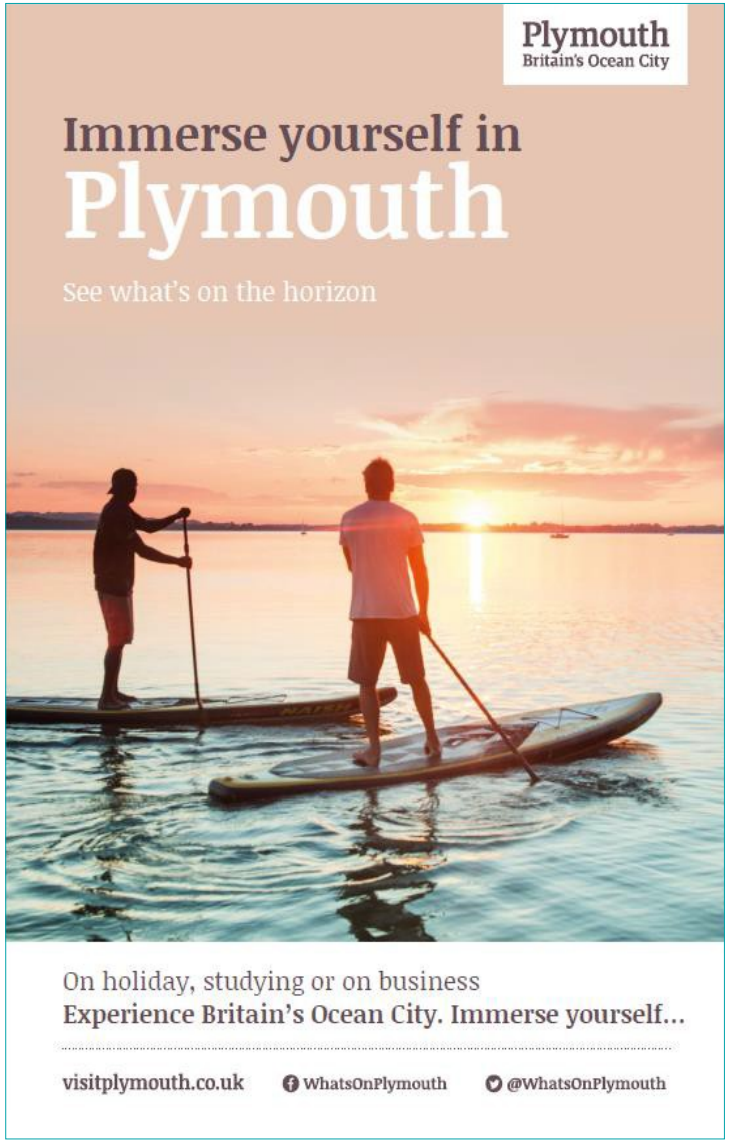
4.1 Brand positioning

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





Smeaton's Tower

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

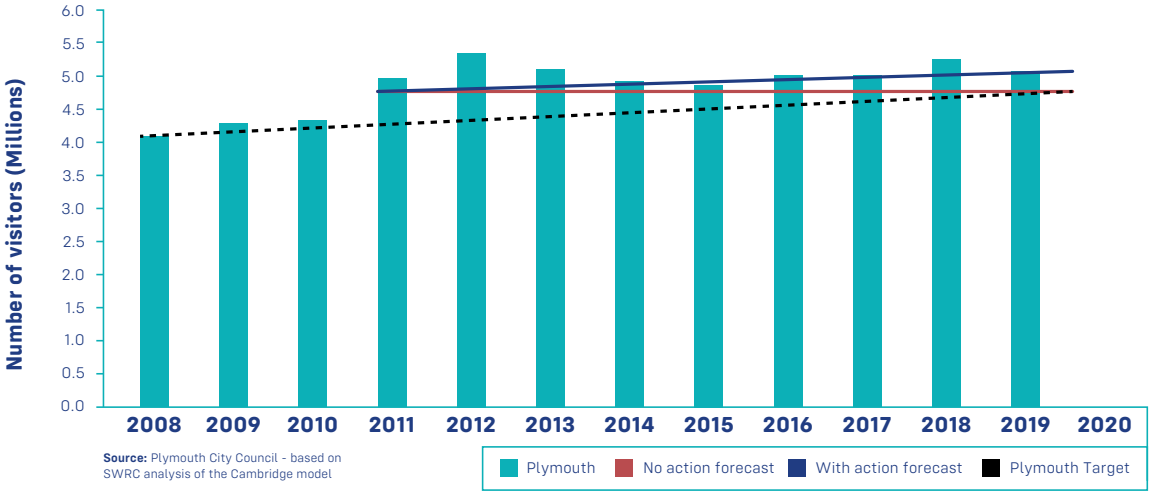
Meetings, incentives, conferences and events we will:

- 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



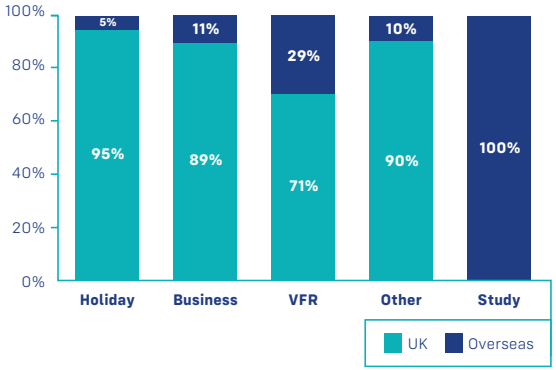
Source: Plymouth City Council - based on SWRC analysis of the Cambridge model

Domestic Tourists	Trips	Nights	Spend
Holiday	462,000	1,708,000	£90,164,00
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**

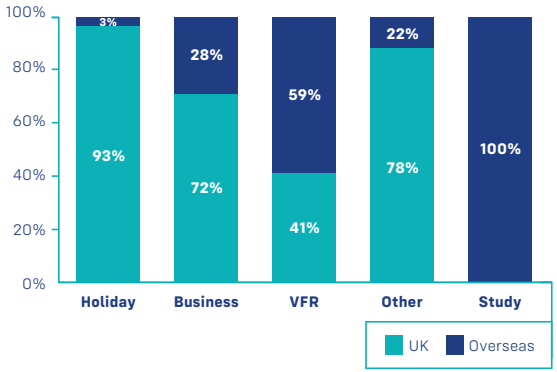
Overseas tourists	Trips	Nights	Spend
Holiday	23,000	126,000	£11,697,000
Business	10,000	49,000	£3,865,000
Visits to friends & relatives	40,000	350,000	£16,289,000
Other	2,000	17,000	£1,488,000
Study	2,000	108,000	£3,871,000
Total	**78,000**	**650,000**	**£37,210,000**

Staying trips by purpose (2019 data)

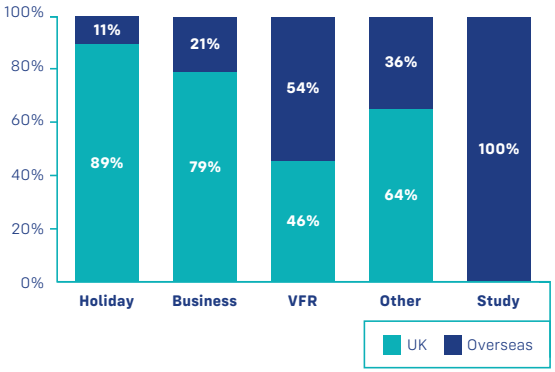
Trips



Nights



Spend



Target Markets Going Forwards

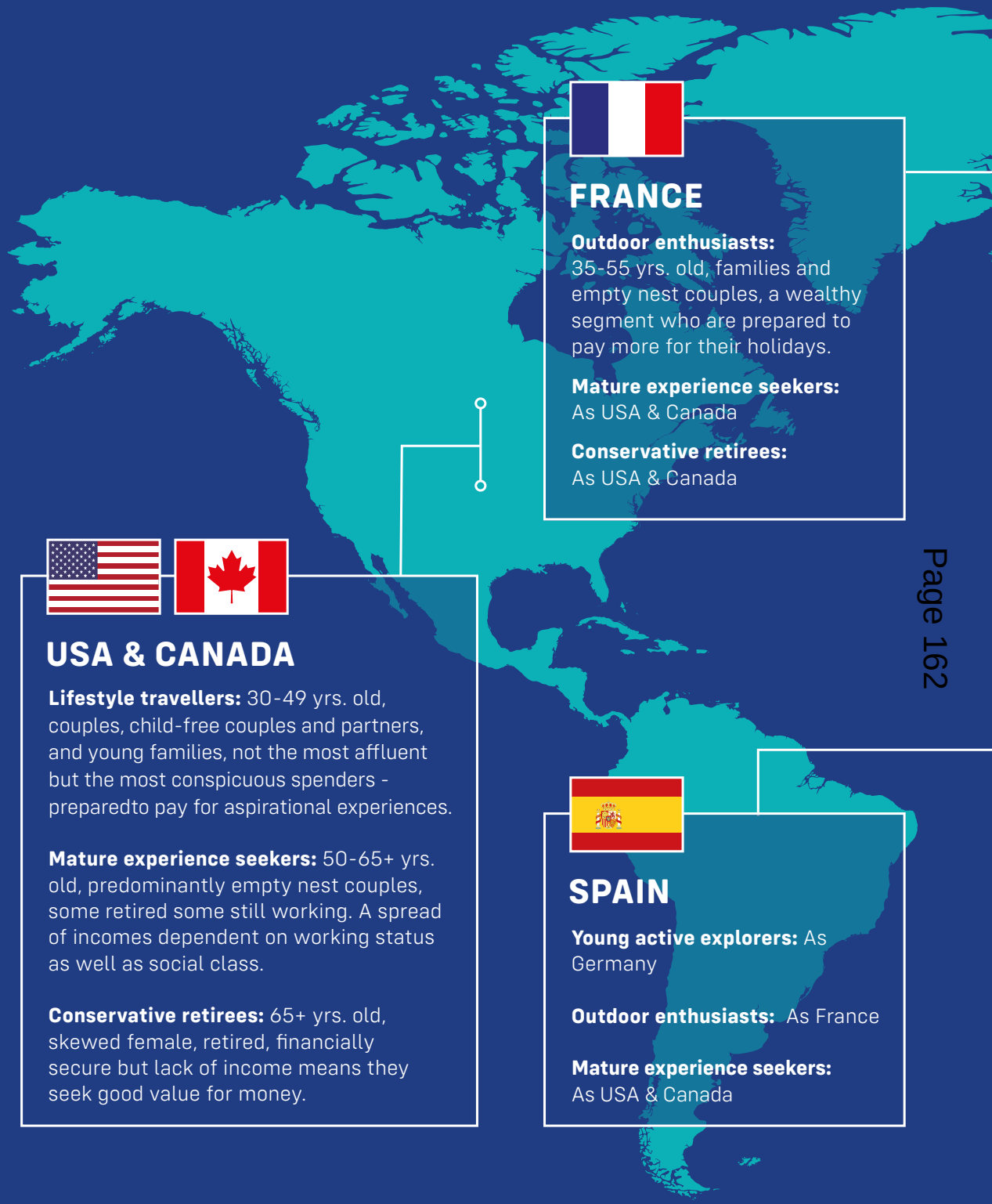
Given our current research our core targets markets going forward will be as follows:

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 - preparedto 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.

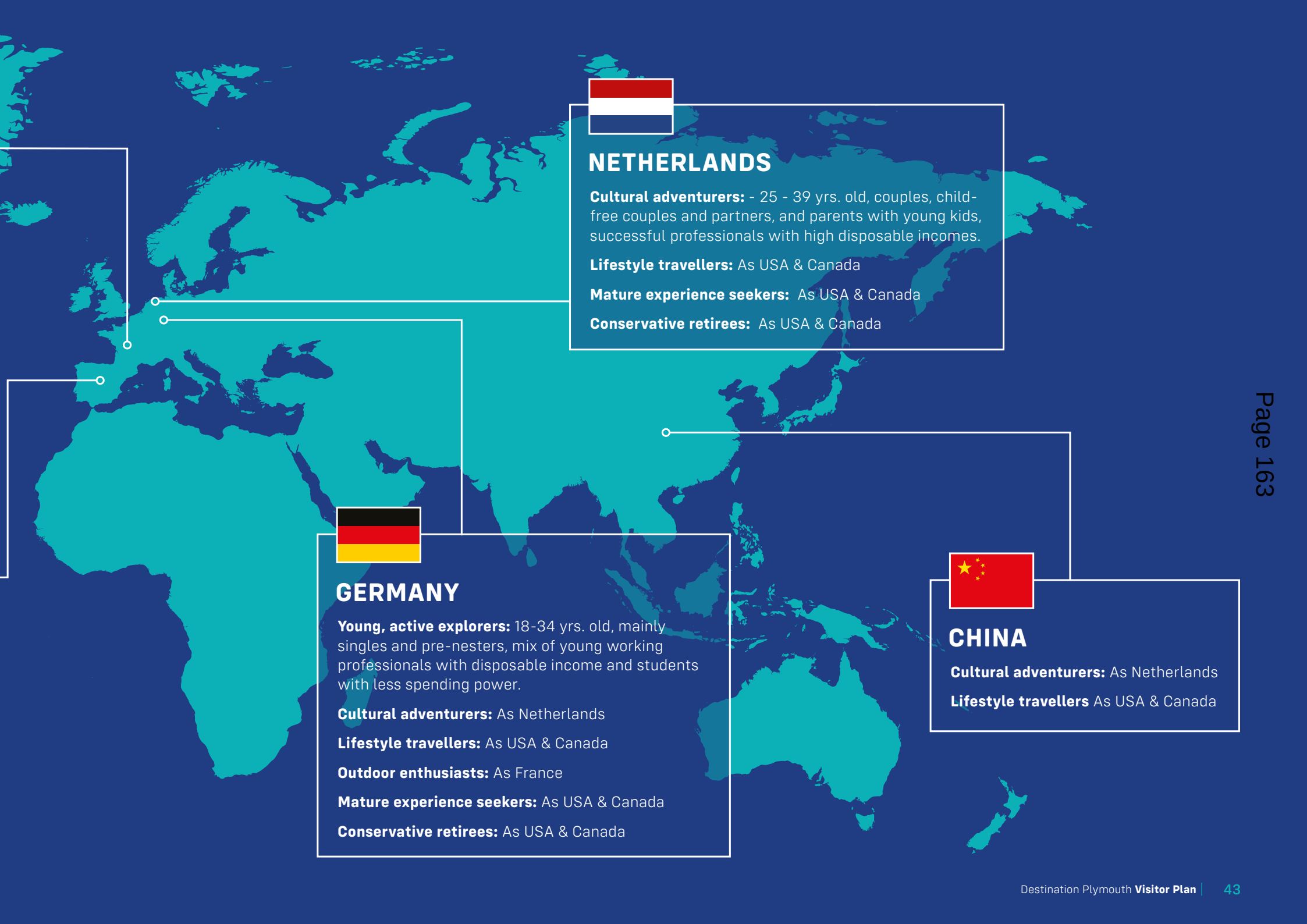
Conservative retirees: 65+ yrs. old, skewed female, retired, financially secure but lack of income means they seek good value for money.

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

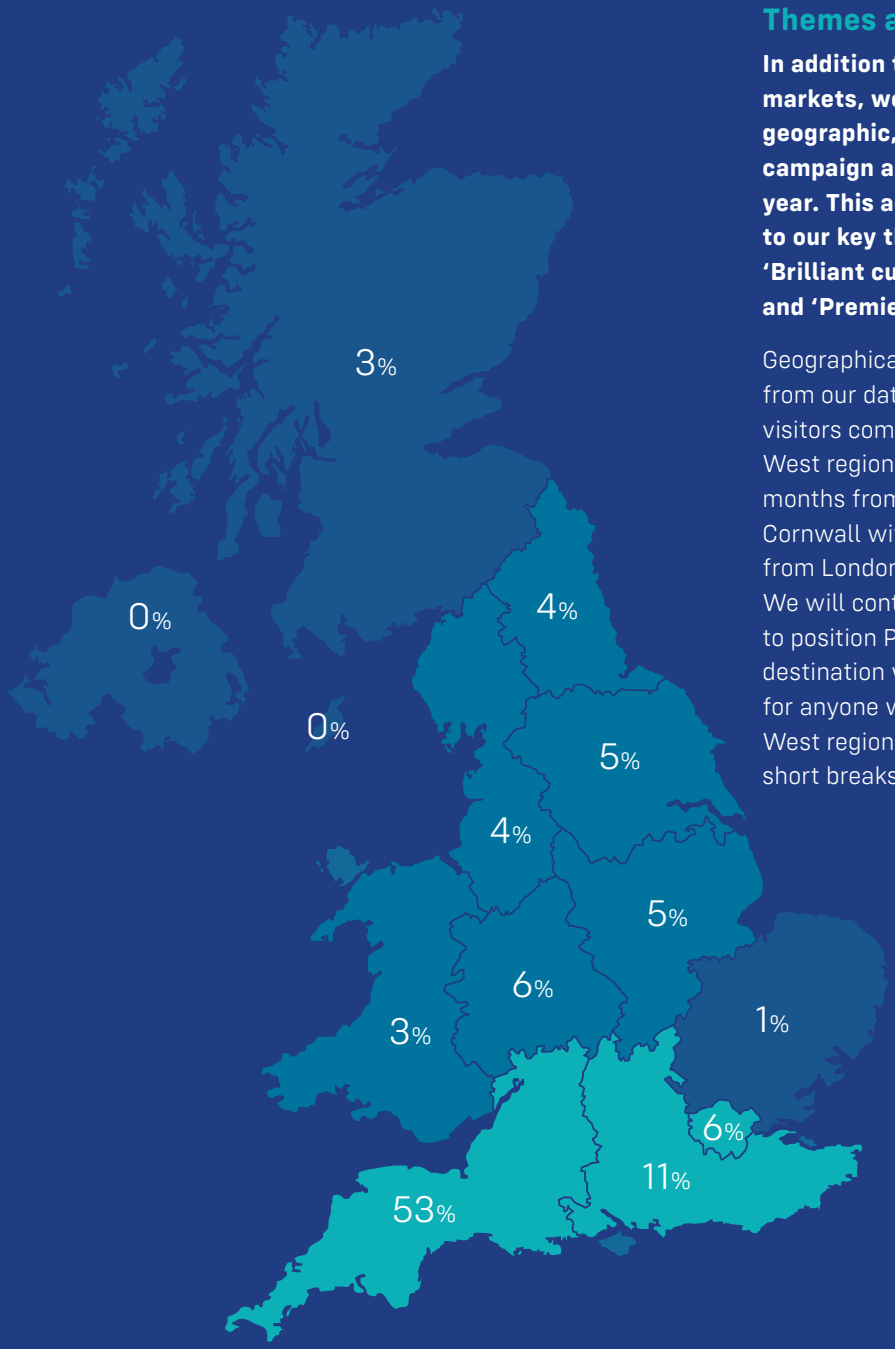
Mature experience seekers: As USA & Canada

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.



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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	



Plymouth Sound

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.


Illuminate

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


Theatre Royal Plymouth

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


Plymouth City Centre

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 identify 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.

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

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	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



Tinside Lido

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

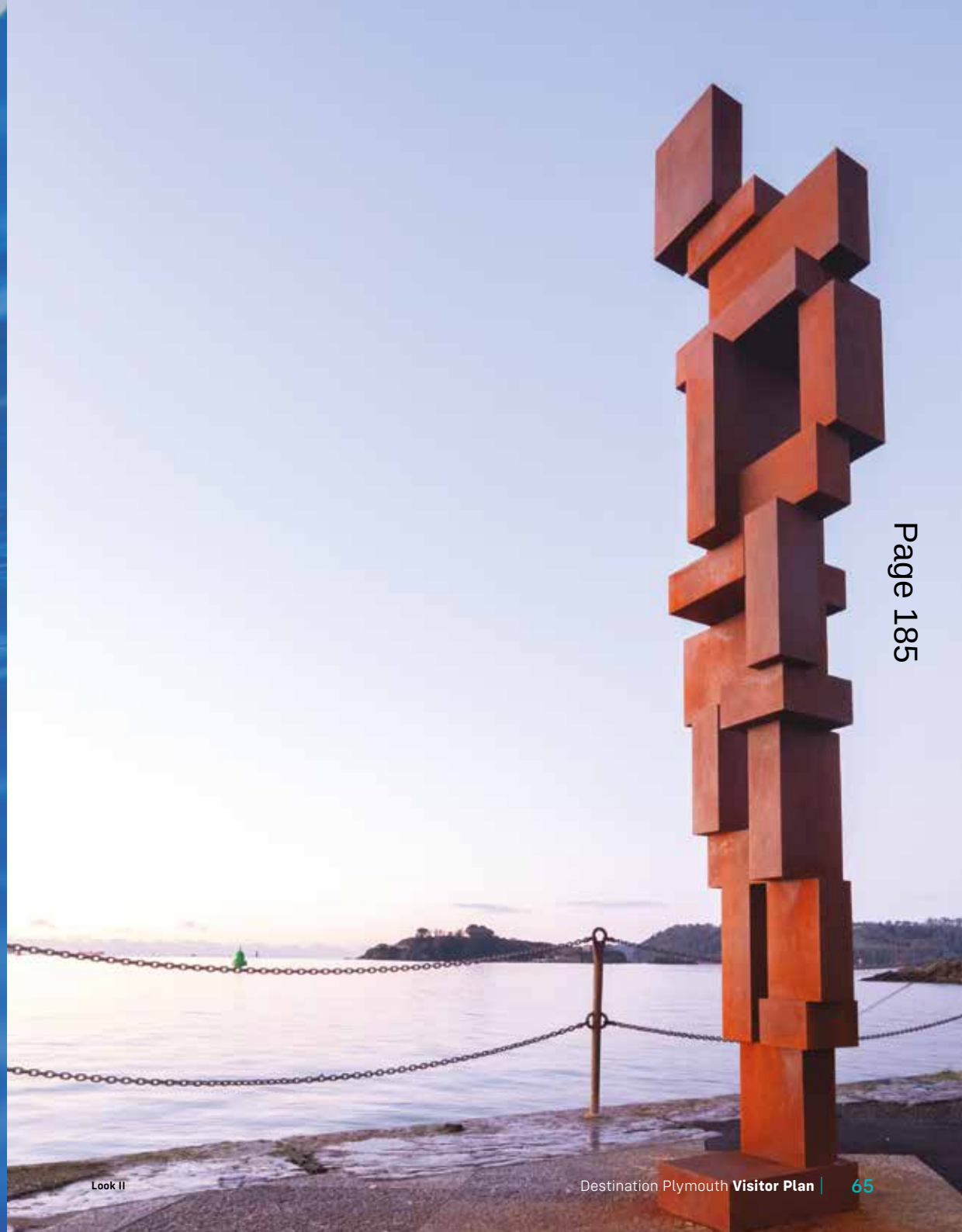
Since 2014 we have implemented bi-annual perception studies to understand existing visitor perceptions of the city and to benchmark quality overall within the destination. This also determines the types of visitor coming to Plymouth and where they are from which aids targeting and future market development. 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.



Look II

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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	• 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:	• 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	• 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	• 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

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ACTIVITY AREA	ACTIVITIES AND MILESTONES	ACTIVITY LEAD
ENABLING PRIORITIES		
OCEAN CITY INFRASTRUCTURE Transport and public realm	• 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	• 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	• 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	• 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	• 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	• 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	• 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

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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:

PLYMOUTH CITY COUNCIL

UNIVERSITY OF PLYMOUTH

PLYMOUTH CITY CENTRE COMPANY

PLYMOUTH WATERFRONT PARTNERSHIP

PLYMOUTH city bus

ROYAL NAVY

PLYMOUTH CULTURE

TRP Theatre Royal Plymouth

bluestone 360

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, Borringdon 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.

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Date of meeting:	08 December 2021
Title of Report:	**Plymouth Sound National Marine Park**
Lead Member:	Councillor Nick Kelly (Leader)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Kathryn Deeney (Head of Environmental Planning)
Contact Email:	Kathryn.deeney@plymouth.gov.uk
Your Reference:	211129 NMP Scrutiny Report FINAL
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The Plymouth Sound National Marine Park (NMP) originally declared as the first in the UK in 2019 has now secured the first significant investment through a successful bid to the National Heritage Lottery Funds, Heritage Horizon Awards. The development of the wider NMP is also being progressed through other secured funding and the recruitment of an Interim NMP CEO.

This report provides an update on the Development stage of the NMP Horizons project and the plans up until the submission of the Delivery stage bid in June 2023 as well as the progress and plans for the wider NMP development.

Recommendations and Reasons

- The Brexit Infrastructure and Legislative Change Overview and Scrutiny Committee become a key point of engagement in the development of the NMP future vision being led by the Interim NMP CEO.
- The Committee endorse the approach to the development phase of the NMP Horizons Project and that scrutiny have a continuing role in assessing the outcome and impact of the Activity Plan and development of the Delivery Phase bid.
- The Committee asks for the Activity Plan for the NMP Horizons project to be presented to it in February 2022.

Alternative options considered and rejected
Option: To progress with the development of the National Marine Park (NMP), both the NMP Horizons Project and the wider Park work without the input of the Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee.

Option dismissed as the NMP is a strategically important project for the City and requires oversight of its development.

Relevance to the Corporate Plan and/or the Plymouth Plan
The NLHF Heritage Horizons funding will support the City 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 project 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) *If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
		1	**2**	**3**	**4**	**5**	**6**	**7**
A	Plymouth Sound National Marine Park – Update Report							
B	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) *If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
	1	**2**	**3**	**4**	**5**	**6**	**7**

Sign off:

Fin	djn.21.22.195	Leg	MS/29.11.21	Mon Off	Click here to enter text.	HR	Click here to enter text.	Assets	Click here to enter text.	Strat Proc	Click here to enter text.

Originating Senior Leadership Team member: David Draffan

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

Date agreed: 29/11/2021

Cabinet Member approval: *Councillor Kelly (Leader)*

Date approved: 30/11/2021

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Plymouth Sound National Marine Park
Update Report

Executive Summary

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 Her Majesty's Naval Base (HMNB) Devonport, 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. It is a historic tourist destination; Plymouth and its people have played a vital role in the development of Europe and the Americas. Nowhere could be more deserving of special recognition at a local or national level. So many pioneering voyages of discovery have set sail from Plymouth that it is natural for Plymouth to be delivering the UK's first National Marine Park (NMP).

To deliver this ambition and transformational project the NMP currently has work streams:

- The NMP Horizons project which provides the first delivery mechanism for the Park a spring board to deliver on wider ambitions for the NMP and inspire other funders to invest in the Park.
- The NMP Park set up which has a much broader scope than the NMP Horizons Project. It will be the new Interim NMP CEO's role to evolve the vision for the Park, review the governance and define a sustainable financial future for the NMP.

NMP Progress to Date.

Plymouth's history, heritage and future prosperity has been and continues to be, shaped by its economic, social and physical relationship to the ocean. The NMP journey to this point of Declaring our Intent has been significant:

- In 2012, Plymouth established its brand, Britain's Ocean City, to inspire, celebrate and promote its marine and maritime heritage.
- In 2012 the concept of establishing national marine parks across the UK was conceived and has since been promoted by Plymouth.
- In June 2018, a national Conference, (organised by Blue Marine Foundation with Plymouth City Council), *Marine Parks: Bringing It All Back Home*, was held at the National Marine Aquarium in Plymouth, which resulted in consensus that Plymouth should be the first to establish a national marine park in the UK.
- The Plymouth Plan (2018-34) adopted in 2019 incorporating our Joint Local Plan, focuses the city's development and regeneration efforts along its HMNB Devonport, unique waterfront,

with world-renowned businesses, particularly in marine science, technology and engineering. It is reflected in the marine city deal and a marine enterprise zone, delivering new investment, new jobs and helping young people gain new careers and job opportunities.

- Since January 2019, Plymouth City Council has sought to facilitate a citywide discussion on the national marine park concept and its potential for development in Plymouth.
- September 2019 – UK's first National Marine Park declared in Plymouth Sound. In September 2019 Plymouth declared the UK's first National Marine Park. The Declaration was signed by leaders of both political parties and sector leads from across the City. The declaration sets out how collectively the City will work together to enhance the economic, environmental and social values of Plymouth Sound, and promote opportunities for the understanding and enjoyment of those special qualities by the public. The full Declaration is contained within Appendix 1
- 2019-2021 – NMP Bid to National Heritage Lottery Fund, Horizons Programme. Multi stage bidding process, including EOI, Interview and full bid submission.
- June 2021 - NHLF award Plymouth nearly £9.6million as 1 of 5 National innovation projects to celebrate the 25th anniversary of the fund.
- Recruitment of CEO to lead the Park – ongoing.

NMP Horizons Project

The delivery of the NMP is commencing with the £9.6million of funding from the National Heritage Lottery Funding. This funding represents the first significant investment in the NMP, increasing both its national and international profile. This will bring the NMP to life by engaging the entire city, co-designing enhancements to physical assets, recovering marine nature and leading innovation in digital engagement with the Park. This will act as a catalyst for delivering the NMP and will enable the transformation to start at pace, leading to the protection and enhancement of the landscape and nature. Working with the Heritage Fund, through shared outcomes and common purpose, we can energise people to become actively involved in shaping the future.

The ambition of the Plymouth Sound NMP Horizons project is to reconnect the entire city to the Sea; rekindling a golden thread between citizens, the marine environment and its history. It aims to protect and enhance our natural and cultural heritage for the benefit of current and future generations, whilst enabling the development of marine citizenship and new approaches to sustainable management. The NMP Horizons project will galvanise residents and visitors to reconnect with and explore the ocean

in exciting ways and to enjoy a city where landscape, nature and community heritage in all its forms can be enhanced, understood and valued for the benefit of people, place and planet.

The NMP Horizons Project will deliver a 'Park in the Sea'. A 21st century park enabling a new collaboration between ocean, heritage and City. Co-designing with communities will ensure people are at the heart of the project, enabling a lifelong connection, fostering positive behaviours and benefits for individuals and heritage. The programme will deliver through five 'Gateways', a network of community access projects and a 'Digital Park'. The gateways will deliver physical, and social connection points focusing on health and wellbeing, active recreation, heritage, nature and environment. More than a park, our 'Park in the Sea' will transform lives, employment, education, volunteering and environment; re-establishing the bond between people and place that has defined Plymouth. The gateways are as follows:

- Tinside and the Hoe – Hub for Health and well-being
- Mount Batten – Hub for Active Recreation
- National Marine Aquarium – Hub for Nature Connection
- Mount Edgcumbe – Hub for Marine and Maritime Heritage
- Smart Sound - Digital Hub Delivering the 'Digital Park'.

The project will be co-designed with the city but as key institutions integrated within the project the following organisations are formal partners on the project:

- Ocean Conservation Trust / National Marine Aquarium
- Mount Batten Sailing and Water Sports Centre
- Cornwall Council as joint owners of Mount Edgcumbe.
- Through the development phase we will also be working with the emerging Local Authority Trading Company that will manage Tinside.

NMP Horizon Objectives

Leading a new generation of Parks, our 'Park in the Sea' will:

- Establish the UK's first National Marine Park
- Protect and enhance a world class natural environment and heritage landscape
- Be a national exemplar and thought leader in enabling a positive response to climate change for Government, Plymouth and the Heritage Fund
- Level up access to heritage to ensure all citizens and Lottery players can enjoy the benefits,
- Provide new employment opportunities and career pathways in sustainable future ocean jobs;

- Act as a city-wide and regional stimulus for economic 'green' recovery post Covid;
- Position Plymouth as a 'UK Top Ten' day visitor destination;
- Create a new generation of engaged volunteers, communities and heritage champions;
- Get the entire City in, on under and next to the water through 5 gateways and a network of community access projects;
- Deliver an innovation pathfinder for digital heritage engagement that will provide an International platform for the NMP.

Timescales and Budget

The Heritage Horizons Programme requires a two stage approach.

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

To secure the Heritage Horizons funding Plymouth City Council (PCC) matched the bid with £2.5million of funding. In addition there is £175k of LEP Getting Britain Building Funding (development phase only) and match funding from PCC staff, partners and volunteer time.

Boundary:

For the submission of the bid, the project boundary aligns with the boundary of the Plymouth Sound and Estuaries Special Area of Conservation. A map of the boundary is contained within Appendix 2

Development Phase Programme:

The purpose of the development phase is to co-design the delivery stage bid with the City. It's a stage where we can test and trial approaches, identify barriers that need to be addressed and ensure the proposals in the delivery stage bid will catalyse a 'Park for the people.'

There a number of components of the development stage that will be delivered through a cohesive programme:

Activity Plan

The vision for the Park is to create a new relationship between the city and the ocean. This will be through community led engagement to connect, involve and activate. Our goal is to establish Plymouth Sound NMP as the people's 'Park in the Sea'. We have had early consultation with

communities and organisations and in response to what they said we have identified a set of Activity Plan aims that we plan to test and refine throughout the Development Phase.

The purpose of the Activity Plan is to enable people to connect with the NMP in a way that is relevant to them. This is such an important part of the delivery of the Park that we submitted an outline activity plan with the bid submission. The outline activity programme can be found in Appendix 3.

The Activity programme it is critical as it will enable people to explore all aspects of the Park and discover what they value about the Sound and why it is, or could become important to them. Engaging a wider range of people with heritage including landscape and nature is a mandatory outcome for the Heritage horizons funding and is central to the value of the project. Enabling the connection is key as from that the opportunities for communities to value and care about the Park increases as does the wellbeing improvements for individuals. The programme will therefore be full of unashamedly fun and exciting activities. It will work at different levels – from mass engagement events to targeted work aimed at understanding and addressing key barriers to why people are not accessing the amazing benefits of the NMP. Throughout the programme our aim is for people to be inspired, connect with the water and develop a sense of ownership and wellbeing by being part of the NMP's future. This element of the work will align with and help deliver some elements of the Motion for the Ocean agreed at Full Council in November 2021.

The final details of the Activity Plan are being refined, but it will include some wild and wonderful events, opportunities to engage and invitations to help design the project. A over view of the programme includes:

- Launching the NMP City Wide Design Team
    - People from across the City can start being part of the NMP design team. Digital platforms and physical spaces will provide opportunities for everyone to share their ideas and ambitions for the Park.
    - National Marine Aquarium – Come and meet the NMP. Free event where all the amazing parts of the NMP will be showcased within the spectacular setting of the NMA. Will be a chance to explore and be inspired but also share your ideas about the NMP and what it should deliver for the City.
    - Digital Innovation Labs Commence – Digital will be key in enabling everyone to experience the wonders of the Sound. The innovation labs will provide a creative space to test and trial the art of the possible in bring the Sound to life.

- NMP Access All Areas
    - Events to enable the City to get in, one, under and next to the NMP. From full immersive experience trying snorkelling to paddling, to hunting for cannon balls, becoming an ocean ambassador through to relaxing with a view of the sea this summer will offer it all.
    - NMP meets the City – The best and most exciting part of the NMP will be transported around the City enabling communities to engage with the design of the NMP without the need to travel to the waterfront.
    - NMP past present and future – Events and activities to connect with our story filled past, to enable people to get hands on in supporting the Park's wildlife and history now and helping to shape a carbon free future.
- NMP Next Generation
    - Piloting an inclusive and cutting edge schools programme which will enable pupils to become 'Generation Ocean'.
    - Working with businesses to enable them to become 'green' next to the blue and make the most of their connection with the NMP.

NMP Hubs and Community Accesses - Design Work and Inclusive Engagement

Across the 4 physical hubs and the identified community access points we will be completing the survey and design work to enable us to secure the necessary consents so we can start at a run in the Delivery stage of the project. All of the ideas and design work will be drawn from the input we receive from people across the City. The NMP hubs will be a vital part of the Activity programme as not only will they receive capital changes during the delivery phase they will provide a lot of the content for engaging people with the Park in both phases.

- *The National Marine Aquarium* - will provide opportunities throughout the development phase for people to see what is under the Sound and be inspired by the wildlife. They will also lead lots of activities outside the aquarium taking all the excitement of the NMA to communities across Plymouth. The Ocean Conservation Trust will also be leading the pilot of a super-sized schools programme, running events to ensuring everyone has the opportunity to learn about the wonders of the Park and being a key part of the Marine Nature Recovery planning work.
- *Tinside and the Hoe* – During the development period the focus will be on trialling new activities linked to the NMP within the pool and finding out what more people would like to use the amazing facility to deliver. Engaging all the incredible groups already using the Hoe to find out what more the NMP could do to support and empower them to encourage a wider diversity of people to enjoy the benefits will also be a key focus.

- *Mount Edgcumbe* – Will be inspiring people about the wonders of the NMP's maritime history through activities on its shores and working within communities to identify what people are interested in knowing more about and how they would like to be involved.
- *Mount Batten Peninsula* – In addition to running some amazing 'give it a go' events at the Peninsula, the Mount Batten Sailing and Water Sports Centre will also be going on tour around the Park to take the activities they offer to waterfront communities within the NMP. This will help identify barriers to participation and how we resolve them during the development phase.
- *Community Access Points* – Identifying and co-designing with the communities a network of access points across the waterfront will be a focussed work stream during the development phase.

Marine Nature Recovery Design Work

Plymouth is already leading ground breaking work on marine nature recovery. Building on the excellent work already happening in Plymouth Sound, during the development phase we will collectively develop a Marine Nature Recovery Plan with achievable but ambitious projects that will be implemented in the delivery phase. Plymouth Sound is one of the most highly protected marine sites in the country and many organisations are engaged in work to protect and enhance the site through the Tamar Estuaries Consultative Forum (TECF). The NMP Horizons project will support this work and in line with the new Environment Act and the recent Motion for the Ocean agreed at Full Council, will work collectively with other to develop a Marine Nature Recovery Plan. This Plan will then drive work to enhance the site through direct action during the Delivery Phase.

NMP Innovation Investment

New investment markets are emerging to fund nature based solutions to our greatest challenges. We want the NMP to be at the forefront of this new area and will therefore be developing an investment plan during the development stage to inform and hopefully help secure further funding for the delivery phase.

Environmental Action

Throughout the development phase a key theme running through all aspects of the work will be ensuring that the activities and events deliver the highest level of sustainability and connect people in a manner that fosters a sense of ownership and care. Plymouth Sound is home to an amazing assemblage of wildlife. The project will nurture a new relationship with the Sound to ensure

additional people and activities they participate in help care for the Park and do not place increased pressure on habitats and species.

There is already a significant level of work taking place in the Sound to ensure wildlife and the activities of people can co-exist. The Tamar Estuaries Consultative Forum is a partnership of organisations and local authorities with statutory responsibility towards the management of the Plymouth Sound & Tamar Estuaries Marine Protected Area (MPA). TECF and its advisory groups – the Port of Plymouth Marine Liaison Committee (PPMLC) and the Wembury Voluntary Marine Conservation Area Advisory Group (WAG) already provide an effective and collaborative framework for managing the MPA whilst recognising the commercial, defence and recreational importance of the site.

There is also work underway to manage the recreational pressures of the growing city on the features of the MPA. The project funded by developer contributions is delivering work to inform users and encourage behavioural change to prevent any conflicts between wildlife and users as more people begin to use the Park.

The NMP will work alongside and learn from these existing projects and partnerships to add value to great work already being undertaken. Partners on the project are also already leaders in the field in engaging people with the Sound in a way that encourages a life-long connection. The Ocean Conservation Trust for example has run a significant schools and learning programme for many years, developing and championing work to develop marine citizens. These existing cutting edge programmes and partnerships are why Plymouth Sound is the perfect place to develop the UK's first National Marine Park. There is already so much learning, knowledge and activity happening that the NMP can link with and highlight to others the great work that is happening. During the development phase of the NMP Horizons project the idea is to work with stakeholders leading these activities to identify how the NMP can add value and enable them collectively to deliver more than the sum of their parts in a cohesive and inclusive manner.

Enabling a positive transition to net zero will also be a key outcome that will run through all the work, from how the capital works are designed, through to transport options in and around the Sound to helping businesses and individuals play a role in reducing carbon and making the city more resilient to climate impacts. Each of the Hubs and community access points will be assessed during the development phase to determine how they can be designed to support the net zero carbon by 2030 ambition. How people move around the Sound and from communities to the waterfront areas will

also be reviewed. This will be looked at through two lenses, how to travel in more sustainable ways and how to remove travel to the NMP as a barrier to use for new users.

Behavioural change will also be inter-woven through the activity plan delivery. In the same way marine citizenship and creating a connection to the ocean will be championed to encourage pro-nature behaviours, the programme will also look at the best way to engage people in net zero carbon action.

Finally through the marine nature recovery work stream in the development phase one of the key areas of focus will be how best to support nature to help lock up carbon. Seagrass restoration is already being piloted in the Sound due to its capacity to act as a carbon sink. The NMP Horizons programme will learn from the seagrass work and other research being undertaken throughout the Park to establish an ambitious programme of nature recovery which supports nature based solution to carbon reduction.

NMP Wider Development

Beyond the scope of the NMP Horizons programme there is much work to be done developing the National Marine Park. We have in place the NMP Declaration and coalition of the willing. We need to evolve and formalise the partnership and governance arrangements and we need to engage stakeholders more formally. We also need to develop some basics including values, brand, communications, funding as well as developing an annual work programme. We have made an offer, subject to references and signing of contract, for the new Interim NMP Chief Executive Officer (CEO) to progress these areas of work over a 2 year period. It is anticipated that the NMP CEO will focus on six key areas:

- To develop a 5 year vision and development plan for the NMP working with the NMP Board and other key stakeholders that clearly defines what the Park is and what the Park is not. To ensure that the Park has scientific and environmental credibility, driving social and economic value with public engagement at its core.
- To develop and lead an engagement plan for the NMP focussed initially on core city stakeholders, institutions and residents. To develop a longer term plan for engaging nationally and internationally that will be delivered beyond the 2 year interim phase. To be the face and voice of the NMP.

- To complete the key elements of the Parks initial set up: Governance review, constitution/terms of reference, brand identify, formalise boundary, online presence, communication plan, environmental statement, policy development and consultation.
- To develop and implement a funding strategy for the NMP, which as a minimum, delivers sustainable funding for the NMP staff structure by the end of year 2
- To oversee the activity and operation of the Park developing and promoting an annual visible programme of activity raising the profile of the Park within the city, region and nationally. Through management of strong networks amplify and coordinate existing interventions including Smart Sound, Horizon Bid, Capital improvements, events, partners work, environmental and community projects.
- To support the National lottery Horizon BID national lottery project and Community Renewal fund

It is anticipated that the Interim NMP CEO will commence in the role in March 2022.

NMP Governance (2 year interim position)

As a result of the scope of the NMP Horizons Project and the wider ambitions of the NMP there are two distinct and separate governance structures. There is a distinction between the NMP Horizon Bid project and the wider leadership and governance of the NMP. They are not the same and need different approaches to governance and executive leadership. The NMP Horizons project needs its own defined governance as required by the Heritage Fund and will be required to follow its own methodology and reporting.

The governance arrangement now is an interim one limited to 2 years providing the opportunity to complete the development work in both spaces before creating a permanent and sustainable solution. The Heritage Fund development phase, which is 2 years neatly provides a timeline for this next stage of the NMP's development.

Further NMP Funding

The NMP Horizons fund provides the first significant investment for the NMP and we are incredibly grateful to the lottery players and the National Lottery Heritage Fund for supporting us and believing in our vision. The Parks ambitions are however significant and further funding in future years will be required to enable the Park to reach its potential.

Fortunately the NMP has already secured £1.4million of further funding. This includes £670k from the Local Enterprise Partnership to deliver enhancements across the NMP including, improvements to waterfront infrastructure and community assets. £100k Additional Restrictions Grant (ARG) funding

for tourism and environmental business support and most recently £630k from the UK Community Renewals Fund.

The NMP has the potential to drive the triple bottom line of prosperity, environment and engagement. However, for the NMP to be successful: the businesses that it contains need to thrive commercially while also supporting the environmental agenda. People, both residents and visitors, need to engage with the marine environment and by doing so support both the business and the environment. NMP infrastructure also needs clear and feasible plans for carbon-zero improvement.

The work within the CRF programme will start a virtuous circle between business innovation and effectiveness, engagement of people, and environmental protection and recovery.
The business targeted in the programme are NMP related, specifically including tourism, hospitality, cultural, sports activity businesses, environment engagement organisations. Ultimately businesses that will benefit from leveraging the attraction of the NMP and also engage public in environmental enhancements.
The programme has 5 key work streams:

- Improve environmental impact and support of NMP-related business through benchmarking carbon emissions and other environmental impact, providing deliverable improvement plans and support to start implementation
- 20 new blue-green tourism/cultural products supporting business growth and attraction developed to support the viability of NMP related businesses.
- Increase public engagement with the NMP and marine environment to drive footfall for economic success and marine citizenship, and increase pride in place
- Create path to a zero carbon and highly usable leisure waterfront, with feasibility studies and business cases produced for low-carbon energy source and environment improvement.
- Gain and understanding of the barriers and drivers of carbon/environment positive change within NMP related businesses

This programme will support the delivery of the NMP Horizons project and the wider development of the NMP.

Recommendations

- The Brexit Infrastructure and Legislative Change Overview and Scrutiny Committee become a key point of engagement in the development of the NMP future vision being led by the Interim NMP CEO.
- The committee endorse the approach to the development phase of the NMP Horizons Project and that scrutiny have a continuing role in assessing the outcome and impact of the Activity Plan and development of the Delivery Phase bid.
- The Committee asks for the Activity Plan for the NMP Horizons project to be presented to it in February 2022.

APPENDIX 1

PLYMOUTH SOUND NATIONAL MARINE PARK

DECLARATION OF INTENT

We, the undersigned, pledge our support to create the UK's first National Marine Park. By this we mean that the undersigned will work together to enhance the economic, environmental and social values of Plymouth Sound, and promote opportunities for the understanding and enjoyment of those special qualities by the public.

The waters of Plymouth Sound are unique and have been instrumental in shaping not just our city's and nation's heritage, culture, wealth and security, but that of America, Europe and many other parts of the world. It is a place where people have met the sea since time immemorial. The National Marine Park will be the legacy that we have the privilege and responsibility of bestowing on future generations.

The National Marine Park will celebrate our past and our future: it will encourage greater prosperity and enhanced engagement with our marine and maritime environment. Building on our current work and existing structures, it will support a new approach to how we value and work in harmony with the natural environment to deliver the greatest benefit for all. Our vision is for a National Marine Park that supports thriving businesses, connected communities and inspired visitors.

The waters of Plymouth Sound are a place of extraordinary and inspiring natural beauty, where local people enjoy sailing, swimming, fishing and countless other leisure activities and where adventurers from around the world have set out on global voyages. They are already home to a complex and diverse mix of uses – from the Navy and the port to commercial fishing and diver training as well as the marine leisure industry. These uses thrive alongside some of the most highly protected areas designated for wildlife in the UK. Through our common endeavour these uses and strong partnerships will continue and be developed further.

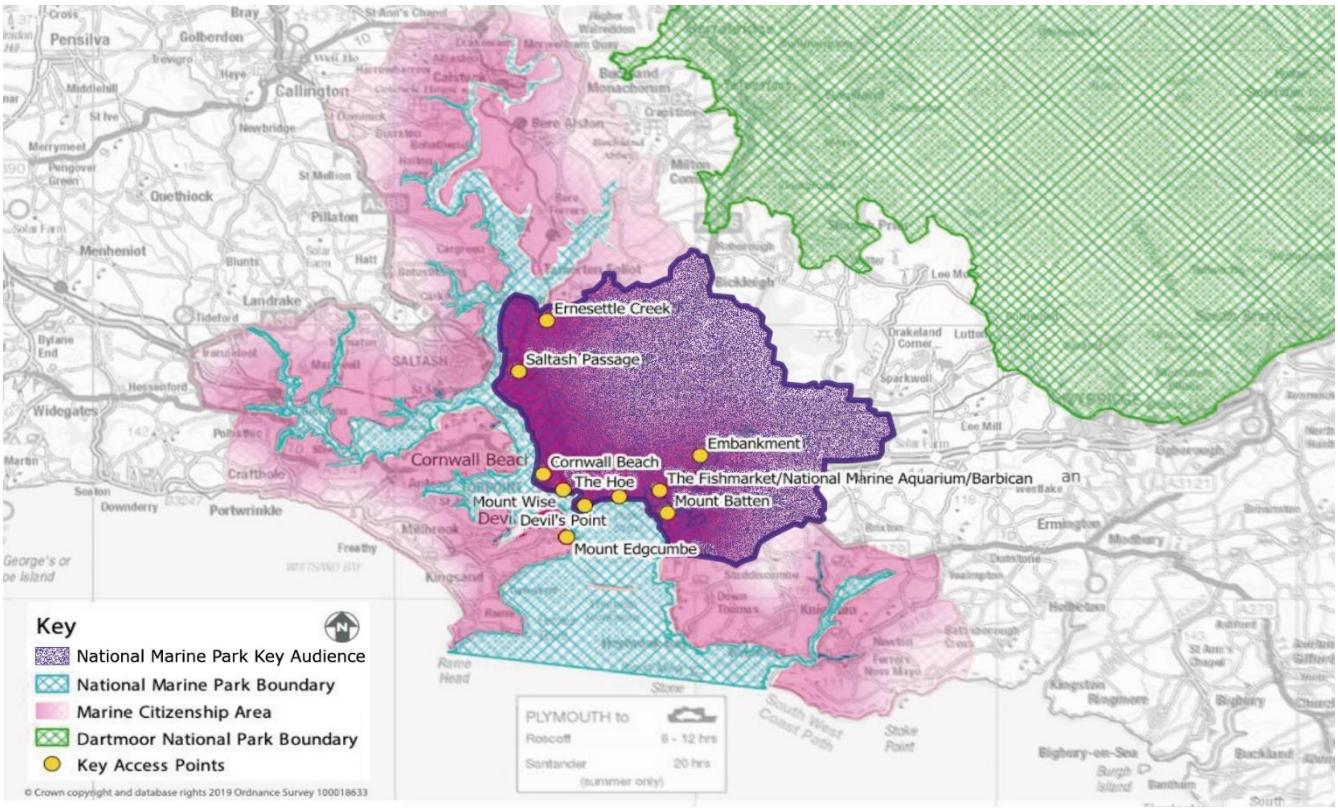
In declaring our intent to create the first National Marine Park in Plymouth Sound we are also signalling the next stage of our journey. Plymouth City Council will constitute a Marine Park Board to co-design a strategy and delivery plan. To provide advice to the Board, a working group will ensure that the voices of all users are heard and fully engaged.

The National Marine Park has been developed collaboratively, declared locally, and delivered through a spirit of opportunity.

We invited the nation to recognise the international significance of Plymouth Sound as we embark on a new journey, as so many others have. We will become the UK's first National Marine Park, and be a proving ground for others to follow this innovative new approach.

This declaration signals a citywide commitment to work with Government, stakeholders and citizens to develop a blueprint for National Marine Parks that can be replicated nationwide. The signatories are not, at this stage, seeking additional statutory powers under the National Parks Act 1949 or other legislation, and will work within existing legislative frameworks. The National Marine Park is a statement of intent of the signatories to work together for the public benefit.

APPENDIX 2 – NMP Horizons Project Boundary



APPENDIX 3 – Outline Activity Plan

Attached Paper

Plymouth Sound National Marine Park

Outline Activity Plan / OL-19-03781

Plymouth City Council



SUP at Royal William Yard. Credit: Jay Stone

PLYMOUTH CITY COUNCIL

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1 Summary

This section summarises the Outline Activity Plan for submission at Round 1.

1.1 Overview

Plymouth Sound is a truly historic landscape and cannot be separated from the people who live and work in our coastal community whether through commercial fishing, shipping, naval defence, coastal leisure and tourism, marine research or blue technology. More than a landscape, it is their heritage and their future.

Yet for the first time since the Ice Age, our marine environment is under threat from climate change, habitat degradation and human disconnection. Our built heritage is being lost and our cultural ties to the sea have, in places, been completely severed.

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. The UK's first national marine park will create opportunities for residents and visitors to reconnect with and explore the ocean in exciting ways and to enjoy a city where landscape, nature and community heritage in all its forms can be enhanced, understood and valued for the benefit of people, place and planet.

Based on three key elements, namely: physical infrastructure; social infrastructure (engagement programmes) and digital infrastructure, our project vision is to create a new relationship between the city and the ocean. Our community-led engagement will *connect, involve and activate*. Our goal is to establish Plymouth Sound NMP as the people's 'Park in the Sea'.

More than a traditional park, our Park in the Sea will:

1. Establish the UKs first national marine park
2. Protect and enhance a world class natural environment and heritage landscape
3. Be a national exemplar and thought leader in enabling a positive response to climate change for government, Plymouth and the Heritage Fund
4. Level up access to heritage to ensure all citizens and lottery players can enjoy the benefits

5. Provide new employment opportunities and career pathways in sustainable future ocean jobs

6. Act as a city wide and regional stimulus for economic 'green' recovery post COVID

7. Position Plymouth as a UK top ten day visitor destination

8. Create a new generation of engaged volunteers, communities and heritage champions

9. Get the entire City in, on under and next to the water through five gateways and a network community hubs

10. Deliver an innovation pilot for digital heritage engagement that will give the Park an international platform

1.2 Approach to Outline Activity Planning

At this early stage of project development, we considered it important to undertake desk research of national and local research data to better understand who currently does, and does not, engage with the heritage of Plymouth Sound. This work has led us to define a set of target audiences for the Development Phase. In addition, we have consulted with the general public via an online survey to get a better idea of how people currently use the Sound and to gather outline responses to some of our ideas for increasing engagement to *connect, involve and activate* with the significant heritage of the Sound. We were delighted with the level of response to our survey (1264 responses) and the diversity of comments received to our open-ended questions [Appendix 3]. These findings have helped shape this outline Activity Plan.

In order to find out more about the range of successful engagement projects and activities that already exist across the Sound, we have undertaken seven stakeholder interviews and facilitated three discussion groups to gain knowledge and 'lessons learned' from these initiatives. This has enabled us to shape a set of pilot projects for the Development Phase, [Action Plan, Section 5] including the creation of a set of digital innovation labs to drive our digital engagement programme. The framework of our activity programme for the Delivery Phase is based on our current knowledge. The programme will be reviewed and amended to address barriers to engagement and our ambition to delivery at the end of the Development Phase.

1.3 Target audiences

As described above, our review of national and local data plus the findings of our online survey has helped us determine who does, and does not, currently benefit from and engage with the heritage of Plymouth Sound. As a result of these findings, we propose that this project as a whole aims to engage with the following **core audiences** via mainstream programming, marketing and digital approaches:

- local ABC1 residents; families, couples and solos.
- in person and virtual visitors to Plymouth; families, couples and solos

Conversely, focusing on audiences who don't currently engage with heritage and water-based activities, our consultation with stakeholders experienced in targeted engagement projects across the Sound has helped us identify a set of priority audiences for the Development Phase of this project, namely:

- families with school age children from lower income neighbourhoods
- schools (primary and secondary)
- students (HE and FE)
- disabled people
- people from BAME backgrounds

Our project developments with digital innovation and interpretation will underpin these two sets of project audiences.

1.4 Engaging audiences

As context to this outline Activity Programme, during the delivery phase of our project we intend to invest in five large-scale 'Gateways' focusing on a specific themes and activities. They are physical hubs focusing on a specific theme as part of a city-wide engagement programme, namely:

- The Hoe Waterfront and Tinside – Health & Wellbeing Hub
- National Marine Aquarium – Nature & Environment Hub
- Mount Batten – Active Recreation Hub
- Mount Edgcumbe – Heritage Hub

In addition to these, is a network of Community Access Gateways. These are smaller in scale, local access points to the NMP. They will be woven into the Gateways, where delivery can take place. Some of these physical assets exist already; our plan is to activate these assets aligned to the Gateways programme. It also offers the potential to develop protect, enhance and improve a number of community asset projects.

Based on the findings of our early desk research and consultation, below is an outline of the Activity Programme that we aim to test and revise in the Development Phase. We have grouped the activities under 8 programme headings, shown here in the summary table and explained in more detail below.

1.4.1 Summary

Programme	Development	Delivery [outline]
P1. Interpretation Plan	• Interpretation designers • Interpretation scheme	• Delivery of the Interpretation Scheme [fixed scheme]
P2. Smart Sound Heritage	• 6 Innovation Labs • Develop a marine observation post (Breakwater) • Hidden treasures of the sound project development • Develop a website "front door" for the park	• Delivery of digital interpretation and solutions • Marine observation posts • Digital park apps • NMP website "front door"
P.3 Activate	• 2 x NMP Festival Weekend – open to everyone – e.g., swimming, sailing and paddle boarding • 30+ Pilot targeted Give it a Go event/s • 3 +Pilot walking events and challenges - potentially with digital innovation • 20 'Sea in the Park' events	• 5 x NMP Festival weekend, open to everyone • annual programmes (5) targeted Give it Go events key audiences • Annual programmes (5) of Walking events and challenges – potentially with digital innovation • Sea in the Park Programme • Public Events programme (enhancement of existing

	• Sea in the Park" engagement alongside existing PCC Public Events programme	programme) e.g. Pirates weekend, seafood festival
P4 Communities	• 1 pilot neighbourhood project	• 5 x neighbourhood projects • Programme of community led intervention
P5 Community History	• 1 pilot community history project	• 4 x community history projects
P6 Enrich: enterprise support	• Case study review of the Future Parks • Taster 'meet-ups' for starter enterprises • Pilot sustainable fisheries initiatives	• Support network with skilled resources • Sustainable fisheries initiatives
P 7 Schools and Future Careers	• Involvement in 10 in-school activities • Involvement in 2 out of school – large scale activity • Primary school Ocean Citizenship programme support – content development	• Involvement in in-school activities • Involvement in out of school – large scale activity • Apprenticeship programme • Student work experience programme • Primary school Ocean Citizenship programme support – content development
P 8 Environmental Ambassadors	• Pilot Park Ranger team model • Pilot 'Community Focus Group' • Pilot Ocean Squad volunteer team • Pilot Heritage conservation team • Pilot programme of activities e.g. beach cleans marine citizen science activities	• Park Ranger team model • Community Focus Group • Ocean Squad volunteer team • Heritage conservation team • Programme of activities e.g. beach cleans, marine citizen science activities

For each programme P2 – P8 our Activity Planning consultants will help us undertake consultation with target groups to better understand the barriers to engagement for that programme, and evaluate the impact of the pilot initiatives against our proposed outcomes.

1.5 Resources to support the project

1.5.1 Staff and consultants

There will be **three new staff posts** to support activity at the Development Phase:

- Engagement Programme Manager [Activity Plan]. Grade I – 1FTE (22 months)
- NMP Pilot Park Ranger Grade H – 1FE (19 months)
- NMP Pilot Park Ranger Assistant (15 months)

In addition, the Development Phase will support **four internship positions**: NMP Seasonal Assistants. These positions are aimed at under-graduates or early career entrants. The Assistants will be aligned to one of four Gateways for 6 months:

- NMP Seasonal Assistant Park Ranger (Grade B) *Mount Edgcumbe*
- NMP Seasonal Assistant Park Ranger (Grade B) *Mount Batten*
- NMP Seasonal Assistant Park Ranger (Grade B) Tinside / Hoe
- NMP Seasonal Assistant Park Ranger (Grade B) *NMA*

Consultant Briefs:

Activity Planning consultants: to undertake stakeholder and community consultation to inform our Activity Plan programmes and author our Activity Plan.

Interpretation designers: as detailed in P1 above.

Evaluation: to develop the evaluation framework and collect baseline data in the Development Phase. A break of contract, to be continued throughout the Delivery Phase should the project be awarded R1 funding.

1.5.2 Partnerships and Collaborations

The formal partners for our project are:

Cornwall Council, Ocean Conservation Trust (National Marine Aquarium) and Mountbatten Watersports and Activity Centre.

1.5.3 Expenditure Summary

Cost Heading	Budget: Development	Delivery
Resources: Staff	381,162	1,286,300

Resources: Briefs	486,500	-
Resources subtotal	**£867,662**	**1,0286,300**
P1. Interpretation Plan	Cross ref to briefs	£250,000
P2. Smart Sound Heritage/ Digital	£54,500	£1,500,000
P.3 Activate	£121,000	£1,267,000
P4 Communities	£3,000	£165,000
P5 Community History	£3,000	£40,000
P6 Enrich: Enterprise support	£40,000	£65,000
P 7 Schools and Future Careers	£4500	£187,500
P 8 Environmental Ambassadors	£23,500	£170,500
Activity Subtotal	**£249,500**	**£3,645,000**

1.6 Outcomes

Our project presents a practical response to the climatic threats to our environment and how we will engage all the people of Plymouth. Engaging residents and the wider community is key to changing the way a city interacts with its environment; to care for, protect it and use it in different ways to develop a healthier and more harmonious relationship with the ocean.

The table below summarises how we anticipate that this project could meet the NLHF Outcomes. We will evaluate and revise these outcomes through further consultation and the delivery of our pilot projects in the Development Phase.

NLHF Outcome	**How the project will meet this outcome at R1**

A wider range of people will be involved in heritage	Our digital, public programming and marketing strands will engage with all residents and visitors to Plymouth, plus remote visitors via enhanced digital engagement. Our activity programmes aimed at our target audiences will increase motivation and build confidence to enable more people to positively engage with our coastal city and raise the profile of the NMP as a safe place for activity and well-being.
Heritage will be in better condition	We will commission a condition survey including statement of significance, to lead to prioritisation of repairs and renewals within a capital programme of key assets and explore methods to support owners to do the same. Our volunteer programme will support ongoing maintenance and care
Heritage will be identified and better explained	Based on the work of the statement of significance, the appointed interpretation designers will co-design an interpretation scheme to unlock vital knowledge and reconnect and inspire visitors and users of the Park. We will use the Development Phase to foster innovation and creativity in the delivery of digital solutions to our engagement mission so as to engage and inspire people regardless of their location.
People will have developed skills	Building on existing school programmes of Ocean Citizenship, we will ensure all Plymouth Primary School pupils are connect with the Ocean on their doorstep and inspired to get involved in our programmes. With a clear focus on STEM career development and 'blue economy start-up enterprise' we will elevate opportunities available to enable young people and career changers Through programmes aimed at our target audiences we will deliver approaches to levelling-up the access points to the higher-skilled marine tech sector by removing real and perceived barriers
People will have learned about heritage, leading to change in ideas and actions	To counter the extreme risk that faces our environment, we will pilot a programme of volunteering to hasten changes in attitude and behaviour, supporting city-wide our leadership in climate change action. Through engagement will all our audiences we will change the way the city interacts with its environment, to care and protect it.

People will have greater wellbeing	We will increase access to green and blue spaces in and around the Sound, encouraging all audiences and targeting our priority groups to participate. Our health and well-being hub will become a focus point for this engagement.
The funded organisation will be more resilient	This project will bring together key institutions across the park to collaboratively deliver our vision and give a more joined up coherent offer within the NMP. Our digital programme will build additional digital capability, skills and resilience.
The local area will be a better place to live, work or visit	Supporting the NMP, this project brings major sustainable development benefiting the economy, society and environment.
The local economy will be boosted	This project is a major economic and tourism driver, improving lives through connecting with our heritage and landscapes, and changing behaviours to reduce our impact on the environment, to restore it and improve it for generations to come

2 Where are we now? – our organisation

2.1 Plymouth City Council and National Marine Park

2.1.1 Plymouth City Council

Plymouth City Council (PCC) is a unitary Local Authority responsible for over 300 local services including transport, social care and education. Established in 1998, it is responsible for ensuring that its business is conducted in accordance with the law and proper standards and that public money is safeguarded, properly accounted for and used economically, efficiently and effectively. PCC has a duty under the Local Government Act 2000 to make arrangements to secure continuous improvement in the way its functions are exercised, having regard to a combination of economy, efficiency and effectiveness.

PCC is bound by its Constitution. The Constitution exists to provide a framework for PCC to take its decisions and do its work effectively. The purpose is to:

- Provide a framework for the democratic process to allow clear leadership for the city.
- Assist PCC to undertake proper consultation and take professional advice.
- Assist PCC to hold decisions takers to account and make sure no-one reviews their own decisions.
- Assist Councillors to represent their constituents effectively;
- Provide a means of improving services.

PCC comprises of 57 elected Councillors representing 20 electoral wards. They meet 9 times a year. Elections are held 3 years in every 4, with a third of Councillors seeking election on each turn. Each elected Councillor serves a maximum term of 4 years and they are able to seek re-election to serve further terms.

PCC operates under a Leader and Cabinet model as set out in the Leader's Scheme of Delegation for Executive Functions. Under this arrangement, all executive functions are vested in the Leader who can delegate functions to the cabinet member. The Leader is also responsible for:

- Appointing members of the Cabinet;
- Delegating executive responsibilities to the Cabinet;
- Delegating executive responsibilities to committees carrying out executive functions;

- Delegating executive responsibilities to individual Cabinet members;
- Allocating executive responsibilities to officers;
- Allocating executive responsibilities when no-one has responsibility for them.

2.2 Policy and operating environment

Locally, the **Plymouth Plan** covers all the policies for the City under three strategic themes: healthy city, growing city and international city. The multi-faceted nature of our project addresses a large number of these:

- HEA7 'Optimising the health and wellbeing benefits of the natural environment' – the NMP will be accessible to all, delivering universal health & wellbeing benefits;
- GRO1 'Creating the conditions for economic growth' – the NMP supports the development of cutting-edge marine and maritime innovation;
- GRO6 'Delivering Plymouth's natural network' – the NMP links the green and blue space around the waterfront and Plymouth Sound;
- GRO7 'Reducing carbon emissions and adapting to climate change' – EV charging points enables the deployment of electric boats in NMP, aligned to ongoing low carbon marine innovation;
- INT1 'Implementing Britain's Ocean City' – the development of the NMP and hosting of SailGP raises the City's international profile;
- INT3 'Positioning Plymouth as a major UK destination' – the project grows the City's visitor economy;
- INT5 'Celebrating Plymouth's sporting excellence' – SailGP is a major international sailing event, establishing the City as a global venue for competitors and audience;
- INT6 'Enhancing Plymouth's green city credentials' – the NMP enables the City to build on its strengths in green technologies and exceptional natural environment.

Plymouth City Council (PCC) is currently updating the Local Economic Strategy as the **Delivering Economic Growth Plan** to cover the period up to 2024. Our proposal will contribute to the 'Visitor Economy & Culture' flagship by raising the profile of 'Britain's Ocean City' in global markets through the NMP. This aligns with the **Visitor Plan** for 2030 to 2030, which includes the strategic ambition for the NMP to be *'globally recognised for amazing experiences, by, on, in and under the ocean.*' It also complements **PCC's Corporate**

Plan (by delivering a 'Growing City'), Leader's pledges (by delivering 'Jobs and Prosperity' and 'A Greener, Cleaner City') and the **Resurgam** strategy to support the City's economic emergence from the lockdown.

At a regional level, our proposal supports a number of the Heart of the South West (HotSW) Local Enterprise Partnership's (LEP) policies and strategies. First and foremost is the **Strategic Economic Plan**. The SEP has three priorities for growth and this proposal directly supports 'Capitalising on our Distinctive Assets'. It delivers this by supporting the delivery of higher value growth in a specialist marine site. More recently, the **2018 Productivity Strategy** has the target of doubling the region's economy by 2038. It sets out three themes that enable businesses to grow and improve productivity. Our proposal specifically supports 'Housing, Connectivity and Infrastructure' by creating a vibrant place that is attractive to skilled people and new investment, with infrastructure to support productivity and inclusive growth. The project fits well with the LEP's **Local Industrial Strategy** focusing on clean and inclusive growth. The development of the NMP complements the strategy's 'Foundations of Productivity' by contributing to the Ideas (green innovation) and Places (a new model of natural capital led growth) foundations. The project will also engage with the **National Retraining Scheme** (NRS) and work with the LEP to find ways to guarantee interviews to individuals participating in a boot camp and the development of Apprenticeship opportunities. We will encourage all NMP stakeholders to participate and create opportunities.

As we recover from the economic shock of national lockdown, central government has recognised the need to invest in our infrastructure through the **Getting Building Fund.** Investment in this project will meet both objectives of the Fund as it drives up growth and jobs through unlocking the first round of economic potential of the NMP, while supporting the development of new models of natural capital led growth to assist a green recovery.

2.2.1 Digital Infrastructure

Over the past 5 years the collective investment in digital infrastructure made by Plymouth's businesses and organisations has resulted in a step change in our innovation and delivery capacity. This includes cutting edge capability; sophisticated networks, data capture and manipulation tools such as Smart Sound, Connected Sound, 4G and 5G; nationally significant immersive facilities such as the Market Hall Immersive Cluster, visualisation, production and 360 dome facilities, immersive labs and skills development; digital fabrication resources ranging from specialist, health tech 3D printers able to 'print' body parts to community

facilities. Partners are now working together to ensure a campus approach to maximise engagement, skills development, innovation and investment opportunities. Covid-19 (2020/21) in particular has seen a huge step-change in the way people use and engage with digital tools. There is huge potential to utilise this springboard, and create practical and innovative opportunities to engage people with the park regionally, nationally and even internationally.

2.3 The outline activity planning process

In order to shape this outline Activity Plan, we have analysed national and local data sets to build a better understanding of the people who live in the catchment area of the National Marine Park. This is presented in section 3.2.1. In addition, we have surveyed Plymouth residents to better understand how they currently engage with Plymouth Sound and to get some headline responses to our outline ideas for greater public engagement. We reached 1246 people through this survey. A summary of results is shown in section 4. 2.1 and in full in Appendix 1. We spoke in-depth to seven individuals from a range of relevant organisations and held discussion groups with three groups representing a cross section of interests. The findings are summarised in 4.2.2. and Appendix 1.

Each section concludes with a short analysis under the heading 'Implications for activity planning'. These key points are used to highlight the sort of barriers to engagement that our planning has made us aware of. It directs us to a set of target audiences and a framework of activities that we would like to explore and evaluate within the development phase. It also leads us to the outline of an Action Plan for the delivery of the project in the delivery phase.

3 Where are we now? - audiences

3.1 Current engagement

As an approach to estimating current levels of engagement we have collected data from a range of contact points within the NMP area. These account for formal engagements, or visits and do not account for the millions of contacts people have annually with the coast-line, and on and in the water of Plymouth Sound. Appendix 2 for full list of Engagement with key locations.

- Mount Edgcumbe: over 250,000 visits (2016)
- Tinside Lido: 5 year average, 24,370 visits (2015-19)

- National Marine Aquarium: 281, 541 visits (19/2020)
- Mount Batten Centre: 7945 activity bookings (2019)
- Plymouth Mayflower Trail: 1338 usage count (launched 2020)
- The Box visits: 33,000 (limited opening Sept – Dec 2020); 11,081 visits to Mayflower exhibition
- The Box, volunteers (opening as above): 1,382 volunteer hours delivered by 88 individuals

3.2 Engagement – National

3.2.1 Engagement with the Natural Environment

Since 2009, Natural England in partnership with Defra, has undertaken the Monitor of Engagement with the Natural Environment (MENE) survey. The main focus of the survey is capturing time spent in the natural environment. The headline report from 2019[1] demonstrates that:

- two thirds of adults (65%) reported that they normally spent time in the natural environment at least once a week and 89% agreed with the statement 'spending time out of doors is an important part of my life'
- nine out of ten adults agreed that they were concerned about damage to the natural environment.
- the main motivations for visiting the natural environment is for health and exercise (56%)
- From 2009/10 to 2018/19 visits to urban green spaces has grown from 41% to 52%; visits to the coast has remained similar from 11% to 12%
- When asked about visit outcomes, 36% of visitors to the coast said it made them feel calm and relaxed and 25% said it made them feel closer to nature
- 94% of the population agree that having green and blue (coast) spaces close to home was important ['within easy walking distance'], when broken down by demographic profiles, the following were **least** likely to Strongly Agree:
    - Young people (16 – 24, 20%)

[1] Monitor of Engagement with the Natural Environment, Headline report 2019. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/828552/Monitor_Engagement_Natural_Environment_2018_2019_v2.pdf

- Residents living in the most deprived 20% of areas (23%)
- BAME residents (19%)

Walking with or without a dog was the main activity undertaken on visits to the natural environment (39% without a dog, 40% with a dog)

A review of MEME survey data from 2009 – 2012 highlights variations and characteristics of social groups[2]. In brief, it shows that the demographic factors that account for **most of the variation** in frequency of visits to the natural environment, in **descending order** are:

- whether or not someone has a **disability**
- where people are member of the **BAME population**
- social economic status [people in the **lowest socio-economic groups** are least likely to visit]
- age, people in the **oldest age groups**

The data also shows the **Environmental behaviours and attitudes** expressed by each of the following five groups of low-level attenders:

- **BAME population: Less likely to** take part in environmental activities including membership of environment organisations; **Less positive** regarding the importance of spending time outdoors and less concerned about damage to the environment
- **Residents of Urban Deprived areas / Members of DE socio- economic groups: Less likely** to take part in environmental activities including membership of environment organisations; **Less positive** regarding the importance of spending time outdoors or the importance of having local green spaces
- **People with a disability or long-term illness: Most likely** to take part in watching or listening to nature programmes on TV/radio; **More positive** about taking action to prevent environment damage, and the existence of natural places they may never visit

[2] Monitor of Engagement with the Natural Environment, (2009 – 2012). Visits to the natural environment – variations in characteristics and behavoirs of social groups within the adult English population

3.2.2 Engagement with Heritage

The Taking Part survey is the key evidence source for the Department of Culture, Media and Sport (DCMS). Analysis of the heritage questions for the survey[3] show that:

- heritage sites are popular: 73% of people reported having visited a heritage site in the last 12 months
- the most common reasons given for visiting a heritage site were to spend time with friends and family (46%), followed closely by having a general interest in history (44%)
- a lack of time (37%) or interest (36%) were sites as barriers to visiting heritage sites. 17% of respondents cited having a health problem or a disability as a barrier
- digital participation is mainly for practical reasons: 30% of respondents reporting having visited or used a heritage website – most likely to check opening times (72% of those that visited a heritage website)
- younger people (16 – 24) and older (75+) are least likely to visit (63% and 60%)
- Black (41%) and Asian Ethnicity (60%) people are least likely to have visited v White 75%
- those in the most deprived areas are least likely to have visited (51%) v 83% from the least deprived

3.2.3 Engagement with Sport

The Active Lives Adult Survey is commissioned by Sport England and provides insight into the sporting and physical behaviours of adults in England[4].

- Around a quarter (25.5%) of adults achieve less than an average of 30 minutes physical activity in a week; the Covid.19 lockdown (1) lead to an overall decrease in activity levels
- People from lower socio-economic groups are least likely to be active (53%) v 73% higher groups

[3] Taking Part 2019/20 – Heritage. https://www.gov.uk/government/statistics/taking-part-201920-heritage

[4] Active Lives Adults Survey, May 2019/20 Report. Sports Council England

- Activity levels generally decrease with age, with the sharpest decrease coming with age 75+ (to 40%). 16 – 34 year olds are most likely to be active (69%)
- Activity is less common for disabled people or those with a long-term health condition (47%)
- There are differences observed in activity levels based on ethnic background; the least likely grouping to engage is Asian - excluding Chinese (53%).
- Walking for leisure and walking for travel are the two most popular forms of activity

Data analysis within the report shows that there is a positive association between:

- activity level and mental well-being – some activity is good, more is better
- social and community development
- activity level and feeling less lonely

Within **families, parents and care givers** play a significant role in shaping a child's attitudes to activity and behaviours. Sport England's insight of evidence shows that parents and care givers can:

- Provide support and encouragement – but they can also add pressure
- Share their own sport and physical activity passions – but they can also share their fears
- Facilitate access to various opportunities to be active – but they can also limit options
- Model active behaviour by taking part with children – but can also model sedentary behaviour.

With a focus on Swimming[5] the data shows that ethnicity plays a large part in who does and does not swim:

- 95% of black[6] adults and 80% of black children do not go swimming at all, compared to 89% of white British adults and 70% white British children (5 – 16)

[5] Sport England, adults 2016-18 & children Nov 2017-19

[6] ONS definition of Black as an ethnic group: https://www.ons.gov.uk/methodology/classificationsandstandards/measuringequality/ethnicgroupnationalidentityandreligion

- Under-representation from the BME community is believed to be in part due to affordability, accessibility and racist stereotypes about the sport[7].

3.2.4 Volunteering

The DCMS Taking Park survey asks a set of questions about volunteering. The data (2019/20) shows that around of third of the population (33.2%) volunteering in one or more culture sector and sport domains. **Volunteering within a sports organisation was the most popular** (20%), followed by Arts (7.7%) and Heritage (5.2%).

3.3 Implications for Activity Planning

Visits to the natural environment are popular and valued by many people for reasons of health and exercise, in addition the majority of adults are concerned about damage to the natural environment. This finding shows that there is a very strong foundation from which to build a programme of engagement that connects the public with the environment of Plymouth Sound and encourages attitude and behavioural change that reduces habitat degradation.

That said, within the general population there are groups of people who are **least likely** to visit the natural environment, heritage sites or be active on a regular basis. These are the people we need to focus our efforts towards through our targeted activities. They are:

- people living in the most deprived areas and on low incomes
- living with a disability or a long-term illness
- from a Black, Asian or minority ethnic background.

Water confidence (and therefore water safety) and the desire to swim for pleasure is very low amongst adults, and lower still amongst adults and children from BAME backgrounds. We also know that parents and carers hold the key to building confidence and modelling active behaviour for their children. With this in mind we will target lower income families with our activities and ensure that swimming and water confidence is a cornerstone of our on-water active programme. Within this we aim to tackle the issues that result in such low

[7] https://www.itv.com/news/2020-03-02/black-swimming-association-hopes-to-get-more-minority-ethnic-people-in-the-pool

levels of water confidence amongst BAME residents and encourage more on-water activity by building water confidence.

We can see real potential to increase levels of volunteering and other engagement or support for environmental, heritage or active causes. The findings show us that motivation to change behaviour is understandably lowest amongst those that engage the least, reinforcing the value in focusing our resources and activities on a set of target audiences.

The current value of **digital engagement** with heritage is primarily for practical reasons such as checking opening times and directions. However, we plan to be ambitious with our use of digital assets and embed a 'digital first' approach to help us reach a wide range of project outcomes, thereby addressing barriers experienced by some of our target audiences such as those living with a disability or a long-term illness and older age.

3.4 The Plymouth Market Place

Population demographics: Plymouth[8]

- The population of Plymouth is 264,200 (mid-year estimate 2016). This is an increase of 6% since the last census in 2006 mid-year estimate, and accounts for 5% of the South West's population. Overall, Plymouth is one of the largest cities on the south coast and is the 15th largest city in England.
- In respect of the population profile of the City, as defined by the local authority area, the following points are key findings:
- children and young people (under 16) account for 17.7% of the population, lower than the figure for England (19.1%). However, with approximately 23,000 students residing in the city, the percentage of 18-24 year olds (12.6%) is higher than that found regionally (8.6%) and in England (8.8%). A key issue for Plymouth is that a large proportion of students move out of the city once they graduate
- Plymouth has lower proportions of residents with higher level qualifications (NVQ4 and above)[9]. 31.4%, compared to the national figure of 39.3%. Conversely, there are higher

[8] Plymouth Report, October 2017, Plymouth City Council & http://www.dataplymouth.co.uk/keyfacts (2018)
[9] Plymouth Skills Analysis, 2018, Plymouth City Council [Source: Labour Market Profile, Nomis, ONS, 2018]

proportions of residents with NVQ1 and above (89.2%) compared to the national figure (85.4%)

- although Plymouth is beginning to show signs of economic growth, there remain high levels of deprivation in many Plymouth neighbourhoods. One Lower Layer Super Output Area (LSOA) in the most deprived 1% in England. This is located within the Stonehouse neighbourhood, part of the St. Peter and Waterfront ward.

3.4.1 Diversity

The Summary Equality Profile, 2020, PCC overs a profile of the city's population as defined by the PCC Equality Impact Assessment, aligned to the public sector equality duty and The Equalities Act 2010. A few key points are highlighted below referencing **disability** and **ethnicity (race).**

- Plymouth is home to above average numbers of households with long term health problems or disabilities (28.5% v 25.7% England); 10% of the population have their day-to-day activities limited a lot by long term health problems or disabilities
- In school, Plymouth has higher than the national average number of children (Year Reception to Year 11) requiring additional support for an identified Special Education Need and / or disability. (18.2% v 14.9% England[10])
- disabled people are more than twice as likely to be unemployed as non-disabled people; the proportion of disabled people with no qualifications is nearly three times that of non-disabled
- Four in five disabled people want to be more active but demand is not being met. Only two in five feel they are given the opportunity to be as active as they would like to be
- The Plymouth population is slowly becoming more diverse. Whilst the proportion of the community that are White British remains higher than the UK average, it is decreasing; from 97% in 2001, to 2011 in 93%. We await new data in this census year (2021). Plymouth is a dispersal area for asylum seekers, around 300 will be accommodated in the city at any given time
- Some areas of the city are more than diverse than others; four neighbourhoods have a population of school age children where 20% or more are from a BME background. They

[10] https://schoolsweek.co.uk/send-pupil-proportion-rise-dfe/

are City Centre (38%), Greenbank and University (32.3%); Stonehouse (29.9%) and East End (23.4%). The schools in those areas all record high proportions of pupils from non-white British background when compared to Plymouth schools as a whole.

3.4.2 Perceptions: Plymouth residents

Plymouth City Council (PCC) undertakes a periodic survey[11] to capture an insight into residents' perceptions and feelings about the city, their community and their life.

A number of relevant findings from 2018 are highlighted below:

- 86% of respondents agreed that they are proud of Plymouth's place in history, with those aged 35yrs+ significantly more likely to agree compared with those aged 16-34yrs
- 68% of respondents agreed they see their future in Plymouth, with those least likely to agree with the statement being those aged 16-24yrs (35%). This could be a reflection of low-levels of graduate retention within the city.
- less than half (42%) agreed they are aware of community activities/groups in their local area and only 19% agreed they are actually involved in these community activities/groups
- 43% of respondents outlined they do voluntary work or help out: the most common way being through helping out their neighbourhood

3.4.3 Perceptions of Blue Space in Plymouth

The Plymouth Survey 2020 included a focus on perceptions of the importance of Plymouth Sound to the city. A few key findings show how much residents value access to the Sound, and highlight marked differences in perceptions between age groups and neighbourhoods. In summary lower income neighbourhoods and younger people valued Plymouth Sound least

- the majority of respondents (68%, n=1,366) strongly agree that Plymouth Sound is important Plymouth;
- the city wards with the lowest rate of respondents strongly agreeing that Plymouth Sound is important to the city are:
    - Drake (54% of respondents, n=57);

[11] Resident Survey 2018, Plymouth City Council (Appendix 9)

- Honicknowle (59%, n=65); and
- Sutton and Mount Gould (60%, n=61).

- respondents 16-24 years showed a lower percentage strongly agreeing that Plymouth Sound is important to the city compared to the rest of the age groups (39%, n=36) v 45-54 years (72%, n=418).

3.4.4 Education

The 2018 DfE school census reports a total of 40,000 school pupils across 103 schools.

School pupils & schools in Plymouth

	Nursery	Primary	Secondary	Special	Pupil Referral Unit	Independent
Schools	2	69	20	7	1	4
Pupils	116	21494	16655	644	198	896

There are two Higher Education Institutions in Plymouth and the HE student roll is as follows

- University of Plymouth: 28,625
- University of St. Mark and St. Johns (Marjon): 2,845.

Additionally, there are two Further Education colleges in the City and the student roll is as follows:

- City College Plymouth: full-time 25,116
- Plymouth College of Art: 2,000 (includes 60% of full time students on Higher Education courses).

3.4.5 The home market: the population resident within a 15 and 30 minute[12] drive time catchment

In order to inform plans for audience engagement, it is useful to look at the profile of people living within a catchment within a specific drive time to a venue or site. Profiles are available

[12] Audience Agency data, based on Census and the Arts Council's annual Taking Part survey, 2019

to cultural sector organisations which show the demographics of the area alongside their level of engagement with the cultural sector and segments the market according to how they tend to interact with culture.

30 minute drive time from the Barbican



In the table below, where a segment is over-represented when compared to the national[13] average it is shown in red and in green when under-represented

Home market population profile

Characteristic	15 minute drive time	30 minute drive time	England
Population (adults 15+)	151,416	277,131	46,006,851
Total population	180,424	333,370	56,117,595
Households	77,224	142,364	23,529,845
Families with dependent children	18,628 (41%)	36,775 (40%)	6,408,564 (43%)
Under 24 years	58,422 (34%)	101,303 (32%)	16,307,596 (31%)
Over 65 years	26,544 (15%)	54,964 (16%)	8,660,529 (16%)

[13] England

Characteristic	15 minute drive time	30 minute drive time	England
Social grades:			
AB	9,349 (17%)	18,086 (18%)	3,751,684 (23%)
C1	19,154 (34%)	32,960 (33%)	5,051,687 (31%)
C2	11,897 (21%)	23,137 (23%)	3,371,058 (21%)
DE	15,494 (28%)	26,376 (26%)	4,164,424 (25%)
Ethnicity:			
White	163,409 (95%)	310,277 (97%)	45,281,142 (85%)
Mixed	2,566 (1%)	3,748 (1%)	1,192,879 (2%)
Asian/ Asian British	3,208 (2%)	4,211 (1%)	4,143,403 (8%)
Black	1,446 (1%)	1,751 (1%)	1,846,614 (3%)
Other	860 (1%)	1,058 (1%)	548,418 (1%)
Unemployment	5,681 (7%)	9,308 (8%)	1,702,847 (6%)
Full time students	7,088 (8%)	10,184 (6%)	1,336,823 (5%)
Qualifications:			
Degree or equivalent	32,849 (23%)	62,696 (24%)	11,769,361 (27%)
No qualifications	29,921 (21%)	56,051 (21%)	9,656,810 (22%)

In summary, the data shows that residents within a 15 minute drive time of the Barbican, Plymouth:

- younger (34% of the population are aged under 24, compared to 31% in England); and within that young profile there is a higher proportion of students (8% v 5%)
- less likely to be classified AB social grade (17% v 23%)
- more likely to be classified C1 social grade (34% v 31%)

- less likely to be ethnically diverse (95% are White v 85%)
- less likely to have a degree or equivalent (23% v 27%).

3.5 Implications for Activity Planning

The Plymouth profile shows that despite signs of economic growth and social change, Plymouth residents, when compared to national figures, and more likely to have **lower-incomes and work in lower-skilled jobs**. As the national data in the previous section illustrates, lower-income communities are least likely to engage with heritage, the natural environment or physical activities. It is therefore very clear why we have selected **families from lower-income neighbourhoods** to be one of our target markets for our Activity Plan.

Plymouth is a university city, and the data shows us that there are **high numbers of further and higher education students** in the city. To strengthen approaches to developing skills, increasing higher-skilled employability and graduate retention, a **central programme within our Activity Plan will focus on marine industry skills development**. Aligning with Plymouth's approach to STEM skills development we will work with children from Early Year onwards to build awareness, ambition and ability. Thus, we will target pupils at primary and secondary, and students within higher and further education.

The although the majority of people perceive Plymouth to be their home and see their future in Plymouth, we are also aware that many **do not connect with community activities, groups and volunteering within their local areas**. Our plan will give focus to engaging with people in their neighbourhood, through outreach activities as well as enabling more people to access the Sound safely from access point more local to their neighbourhood.

Minority groups within the Plymouth population for example residents with l**ong-term health problems or a disabilities, including SEND pupils, and residents from ethnically diverse backgrounds are amongst the most disadvantaged communities in the city**.

Although the frequently cited perception is that Plymouth is not an ethnically diverse city, the city profile is changing and within there are distinct neighbourhoods where ethnically diverse families live and their children go to school. Partnering with those schools and community organisations is the natural starting point to engaging with these residents.

Addressing the needs and interests of the **10% of Plymouth's population who are of poor health and disabled** is positive step towards addressing the disadvantage those people and families experience.

4 Involving people in the project

4.1 Vision & Goal

Our vision is to create a new relationship between the city and the ocean. This will be through community led engagement to *connect, involve and activate*. Our goal is to establish Plymouth Sound NMP as the people's 'Park in the Sea'.

Based on our early consultation and research we have identified a set of **Activity Plan aims** that we plan to refine once we have undertaken our Development Phase.

4.1.1 Aims

In outline, this Activity Plan aims to:

- unlock vital knowledge and foster greater awareness to ensure the future sustainability of the National Marine Park by protecting and preserving an internationally significant environment for the benefit of present and future generations
- deliver a programme of volunteering to hasten positive changes in attitude and behaviour, supporting city-wide our leadership in climate change action and heritage conservation
- increase motivation and build confidence to enable more people to positively engage with our coastal city and raise the profile of the NMP as a safe place for activity and well-being
- encourage local people to engage with the NMP landscape and heritage on their doorsteps, supporting local access improvements, well-being and behavioural change
- ensure all Primary aged school are given a grounding in Ocean Citizenship
- elevate opportunities available to enable young people and career changers to gain skills, employment and develop enterprise in our 'blue economy; and through targeted work, level-up the access points to the higher-skilled marine tech sector by removing real and perceived barriers
- foster innovation and creativity in the delivery of digital solutions to meet our project vision. By positioning Plymouth at the forefront of digital advancement we will enable everyone who engages with the park to understand, protect and champion the richness of the heritage of Plymouth Sound

4.2 Key findings from consultation

4.2.1 Survey

In order to gather public views about using the NMP we launched an online survey which was promoted via social media platforms. The survey was open for two weeks and in that time received 1,264 responses. This high level of response is a finding in itself, pointing to high levels of interest and motivation to be involved in the project.

The survey contained several open questions. It was striking that a high proportion of those responses related to concerns around conservation and environmental issues, with concern raised that the development of a National Marine Park would further compromise an already fragile environment.

> It should be an ecological park rather than a theme park
>
> I would love to see Plymouth sound national marine park be more engaged with the protection of local habitats.
>
> Education on the environmental sensitivities of habitats in the Sound and the importance for restricted recreational areas

That said, there are almost a thousand comments to review, covering a wide range of opinions with real support for plans to get more people safely on, in and under the water. Appendix 3.

> Cleaner waters to support swimming. Better use should be made of foreshore between Tinside Pool and West Hoe harbour.
>
> Access by foot is very difficult! Paths and steps are very steep and uneven and almost impossible to negotiate the nearer to the Sound you get. Activities won't happen if people can't access the waterfront.
>
> How about… a series of strategically located underwater and land-based web cameras accessible via the internet
>
> ….safety education for taking part in activities alongside busy boat traffic, and wider understanding of tides, water quality etc.

Full results are presented in Appendix 3. A small set of headline findings are shown below:

- The majority (83%) of respondents said that Plymouth Sound was currently **very important** to them and the highest proportion (87%) said they have used or currently use Plymouth Sound for enjoying time by the water

When asked to agree or disagree with a range of statements, people particularly agreed that the Marine Park should:

- provide more opportunities to access and engage with nature (95% agreed or strongly agreed)
- help people to understand the history and heritage of the Sound (93.8%)
- bring local people together and help them feel more connected to their local area (93.6%)
- When asked what would encourage them to use the NMP more or in a different way, At least two thirds of respondents were interested in each of the options for improving Plymouth Sound, but people were particularly interested in exploring the landscape, learning about nature and the environment, new and improved facilities and access points.
- A chance to explore the landscape around the National Marine Park e.g. through trails and activities (89.3% agreed or strongly agreed)
- More opportunities to learn about nature and the environment of the Sound (87.1%)
- New and improved facilities e.g. toilets, lockers and changing facilities (84.1%)
- When asked further what would encourage them to visit the proposed Marine Park, respondents were most interested in:
- An exciting events programme (79.1% agreed or strongly agreed)
- Digital tide and weather information (76.7%)
- More seating and observation points to watch activities taking place in and around the Sound (75.3%)

When asked about the barriers to using or visiting Plymouth Sound Over half (52.3%, 463 people) of respondents who answered the question, said that the current state of the facilities prevented them from using the Sound as much as they would like. They also mentioned a lack of information about what they could do near or within the Sound (39.4%, 349 people) and accessibility issues (30.6%, 271 people).

The full results show the demographic range of respondents including 15% with health problems or disability and 12% from an ethnic background other than White British.

4.2.2 Consultation

Consultation undertaken for this outline Activity Plan has demonstrated that there is significant foundation of existing knowledge and activity in respect of engaging people with Plymouth Sound, and substantial interest and motivation for greater involvement from the public. There is much to build on, opportunities to seize, partnerships to be made and ambitions to be reached. Appendix 1 outlines the findings of consultation with:

- Cllr. Pam Buchan, Plymouth City Council
- Dr. Alan Butler, Learning Facilitator, The Box, Plymouth
- Josh McCarty, Blue Marine Foundation
- Tina Brinkworth, Head of Skills and Post 16 Education, Participation and Skills, Plymouth City Council
- Roger Maslin, CEO Ocean Marine Trust and National Marine Aquarium
- Tors Froud, Making Waves Plymouth, [Sport England funded engagement project]
- Alex King, Centre Director, Mount Batten Group

Discussion groups were held with

- Ernesettle residents with an interest in local conservation and water access
- Engagement and Learning team, OCT and National Marine Aquarium
- NMP Digital leads; Lindsay Hall, RiO

Findings are summarised under the following framework headings:

Activity Programme	Findings from consultation 2021
ACTIVATE	**Tors Froud, Making Waves Plymouth** • 2 year project funded through the Sports Council Families Fund • Offers free water sports sessions to residents of two local income neighbourhoods (PL1 &2) • Highly successful, working with Mount Batten and other water sports providers • Learning: swimming is key to water confidence – therefore invested in Life Centre swimming lessons, and within Covid, open water swimming lessons.

	• Met targets for both years, as project developed more focus on reaching a more diverse audience: Hope refugees, Sanctuary Domestic Housing, Shelter. Observed cultural issue with black families – swimming and water confidence very low • Family engagement central to delivery; children encouraging parents and grandparents to 'give it a go'; Evidence of successfully engaging serious disengaged young men • Although focus on water-based skills, focus enables range of 'ocean literacy' projects – litter picks, conservation, wildlife knowledge etc. • Legacy – project ends 2021; investigating CIC as a model to continue the engagement work • Water access points is a significant issue, and lack of public transport, disability access, toilets etc. are barriers to full engagement **Josh, Blue Marine Foundation** • An international charity - ocean conservation focus; marine protection, restoring ocean habitats; sustainable fishing; connecting communities with the sea through increased understanding. • Instrumental in the development of the NMP concept; responsible for the Marine Park conference 2018. • Delivery of a large-scale outreach project 'Sea in the Park' (2019) in partnership with PCC and Marine Biological Association, delivery in Plymouth parks 18 parks • Proposed a set of engagement projects for development [Appendix 1 for detail]: **Alex King, Centre Director, Mount Batten Group** • Watersports centre, solid reputation for individual and group engagement • Location creates a barrier for engagement – as transport is a key issue; water links could be improved • Exploring the potential for 'outreach' – e.g. taking kit to neighbourhood water access points – Stonehouse creek mentions • Essential that key players work together to provide an overall programme of Ocean literacy e.g. MBA, NMA, University of Plymouth • What is the next step beyond taking your family to the beach? Explore how to develop an experience with responsibilities • The Plastic Free movement is at the forefront of campaigning; the logic being if you appreciate the environment you will be more respectful.
COMMUNITIES	**Councillor Pam Buchan, Honicknowle, includes Ernesettle** • Ernesettle is a post-war neighbourhood estate, rural and estuarine on outskirts of urban Plymouth, low income – relatively elderly. • Many special environmental qualities; long history of settlement – untold histories

	• Illegal access to river front; complex ownership scenario to resolve • Local action to resolve access; problematic • Good foundation of neighbourhood support – some interest in environmental conservation / some in marine safety • Existing investment (Big Lottery) and West Countries River Trust – aligned to community development, access, knowledge, stewardship. **Neighbourhood residents (focus group)** • Active Neighbourhood14 (2016 – 2019) was the kick start to the Friends of Ernesettle and Budshead. Excellent foundation, well evaluated, significant public engagement; one of four neighbourhoods in Plymouth • Would like to continue the programme of work now that the Active Neighbourhood programme has completed; e.g. extend the pathway around the headland, improved disabled access, bird hide, more family events. • Motivation: nice to share the area, improve the area, its beautiful, not many places in Plymouth like Ernesettle for location, history, waterfrontage – but a lot of myths and half-truths have built up over the years that have little basis of fact – or the facts aren't know e.g. you'll get stuck in the mud, the currents will tow you downstream etc. • Lots of opportunity to change opinions and behaviour by better information, skills and knowledge – proven by the Active Neighbourhood project • Important to have a high level of consultation, to help built community spirit • Significant numbers of people use the water, more so in lock down; boats moored, boats and other crafts launched (DIY slipway); fishing. Demand for access and to give water sports a go – community paddle: Scouts and Youth club. • Water is full of dangerous 'junk' – scrap metal etc., would be scared to go in for swimming or other sports; some basic improvements e.g. life buoy to be installed soon • Perceive that people are concerned about what they can – and can't do, and what is safe – training and safety courses welcomed • SSSI protections in the area, includes are with high public foot fall; no clear understanding about what the purpose of the protection – what are the species?
HISTORIES	**Dr. Alan Butler, Learning Facilitator, The Box, Plymouth** Very strong track record of community engagement, and community heritage projects within museum team, and dedicated gallery space within the museum redisplay in the Box. Examples[15] include the social history of Maker Camp, on Rame Peninsular, Cornwall. In this instance the Box team worked with Maker and Rame Community Interest Company (CIC)[16]

[14] https://bluehealth2020.eu/wp/wp-content/uploads/2017/01/Active_Neighborhood_Report.pdf
[15] https://www.theboxplymouth.com/communities/maker-memories
[16] https://www.makermemories.org

	to preserve Maker's rich social history and capture the stories about it that still exist in peoples' memories. **Saltash Passage**, WW2, American forces local memories and knowledge, agreed it was an underexplored area; St. Budeaux has a local history group supported by Timebank[17] - opportunity to discuss with the group.
ENRICH & FUTURES & AMBASSADORS	**Tina Brinkworth, Head of Skills and Post 16, Education, Participation & Skills, Plymouth City Council** • City-wide commitment and strategic focus on enhancing the STEM economy in Plymouth; 9K job vacancies city-wide – high proportion in marine related industries • Alignment to marine job / career employer needs- and future needs as skills evolve • Co-ordinated approach with employers, FE, HE and employment services • Recognition that interventions start at the earliest age; structured approach in place to deliver those interventions – EY to KS5 • Commitment to 'levelling up', to address under representation through a direct approach in and out of school • Investment in training and apprenticeship offer a vehicle for opportunity **Roger Masin CEO Ocean Marine Trust, National Marine Aquarium. Engagement Team:** **Helen Gowens, Nicola Bridge, Stu Higgs** • Strong foundation of good practice; public, community and in-school learning - skilled and experienced team; a national resource, beacon of good practice nationally – high footfall, national profile • Recognition that conservation of habitats relies on behavioural change; thus programmes are designed to raise awareness, increase emotional responses and promote change in behaviours • High reach into Plymouth schools – 97% of schools; targeted work with Special (SEND) schools • Devised and delivering curriculum support scheme – 'Ocean education' led; working with a MAT (Connect) – aspiration to roll it out. Can case studies be added that are Plymouth Sound specific? • Place-based conservation is central to behavioural change – Teats Hill project example • Programmes designed as a pathway, theory of change model, from an entry point – to points of greatest impact • Marine STEM days – large scale; working with PCC, example of boat building teams from schools – working with Princess Yachts • Informal learning - participation opportunities: Ocean Squad (young people); Volunteers to support Ocean Discovery Rangers; Rangers – outreach facilitators / sessional workers (?) (Rock Pool Rambles etc.); • Digital shift, necessitated by Covid has demonstrated effectiveness of online. VR resources – used in school, care-homes etc

[17] https://www.timebanksw.org/about-us/

	• Drakes Island – remarkable habitat (sea grass); iconic / distinctive feature of Plymouth – case study material for teaching / engagement?
DIGITAL	• Innovation within digital; innovation labs within the Development Phase to explore potential • Practical use of digital – unlocking data / digital information that already exists – packaged for easy public usage • integrated into themes as above – illustrations given

Ernesettle resident, **Active Neighbourhoods** (2016 – 19):

> For me being able to socialise whilst participating in nature activities is so important. I never thought that after my stroke I would be able to do anything like this… This day has been a very important experience for me and I now have a much more positive attitude to being able to do such things.

Feedback from participants of the **Making Waves Plymouth** project, funded by Sport England. 2019 – 2021.

> Our eldest has issues with anxiety and trying new things can sometimes be very overwhelming. She also really struggled with the feeling of sadness. After a couple of years with the project and the amazing support and encouragement, you would never have known this to be the case
>
> As a single parent of two girls on Universal Credit this project has benefited our family phenomenally. It has afforded me ways to make up for the fact that we are unable to go on holidays anywhere... instead they have had these wonderful activities to look forward to. It has helped their mental well-being particularly during Covid.

4.3 Outline of Barriers

On the basis of the feedback and information we have gathered at this stage of our planning we have highlighted a short set of barriers that we think limit the engagement people have with Plymouth Sound. An analysis of these barriers has directed us to a set of potential opportunities for engagement activities that we would like to evaluate within the Development Phase of this project. This will allow us to review this set of barriers and our proposed activities for our Delivery Phase Activity Plan.

Behavioural change to combat the impact of climate change is the heart of this Activity Plan, and although it is not a barrier to engagement, it is central to decisions relating to activity planning.

Barrier	**Project Opportunity**
Cost of activities and equipment	Tasters for low cost / non cost activities; subsidy to remove price barrier; explore options for low-cost access thereafter; explore sponsorship for swimming kit
Travel, parking, sustainable transport	Continued investment in cycle and walking routes (on-going via PCC); activities that package transport with activity – especially to destinations like Mount Batten; improved communications to promote sustainable methods to reach key destinations; improved water taxi service
Current poor state of facilities	Targeted improvement for water access; changing and safe storage; a focus on accessibility within designated areas
Lack of information: what's on; where to go; the heritage and history; marine conservation; practical information – tides, weather, wind etc.	Interpretation scheme across the park area; 'welcome' exhibition, refresh of static interpretation boards; innovative use of digital and data; archival data and the wealth of images and collection knowledge within The Box. Explore digital solution to bring together existing data to package with a user-friendly interface – weather, tide, windspeed etc
Fears about water safety	Define clear messages about water safety – access and usage parameters Increase water confidence through water safety lessons and by digital learning and content Define safe water access points in neighbourhood areas and educate about safe access, tides, currents etc through digital innovation.
Under representation from minority communities	Consultation will define practical and perceptual barriers that reduce participation, volunteering and employment for minority communities e.g. physically disabled, learning needs, ethnic minority, lower income families. Refine activities that target key audiences by removing barriers
Career Pathways appear inaccessible Pupils, students and career changing adults do not have the right skills	Increase accessibility of career pathways Build on the city-wide strategic approach initiated by PCC to develop STEM skills and qualifications at Key Stages; invest in training and apprenticeship opportunities; facilitate 'blue enterprise' through support and enabling mechanisms

and experience needed by a range of marine related industries for skilled employment; and the opportunity to foster enterprise as part of our 'blue economy'	Basic knowledge and understanding of the value of marine environment week for school aged pupils – and relevance to the Plymouth environment not made clear.
Coastal history is hidden and under-told For many living in estuarine, or coast neighbourhoods there is little to connect them to the history of their neighbourhood, and therefore to value or to feel pride in.	Coastal history uncovered and better interpretated; with an emphasis on digital solution to increase visibility, open up and share. Build on the significant experience of the community learning team in The Box

4.4 Target audiences

As described in section 3 and 4 above, our review of national and local data, plus the findings of our online survey has helped us determine who does, and does not, currently benefit from and engage with the heritage of Plymouth Sound. As a result of these findings, we propose that this project as a whole, aims to engage with the following **core audiences** via mainstream programming, marketing and digital approaches:

- local ABC1 residents; families, couples and solos.
- In person and virtual visitors to Plymouth; families, couples and solos

Conversely, focusing on audiences who don't currently engage with heritage and water-based activities, our consultation with stakeholders experienced in targeted engagement projects across the Sound has helped us identify a set of **priority audiences** for the Development Phase of this project, namely:

- families with school age children from lower income neighbourhoods
- schools (primary and secondary)
- students (HE and FE)
- disabled people

- people from BAME backgrounds

Our project developments with digital innovation and interpretation will underpin our project audiences.

4.5 The Activity Programme

As context to this outline Activity Programme, during the delivery phase of our project we intend to invest in five large-scale 'Gateways' focusing on a specific themes and activities. They are physical hubs focusing on a specific theme as part of a city-wide engagement programme, namely:

- The Hoe Waterfront and Tinside – Health & Wellbeing Hub
- National Marine Aquarium – Nature & Environment Hub
- Mount Batten – Active Recreation Hub
- Mount Edgcumbe – Heritage Hub

In addition to these, is a network of Community Access Gateways. These are smaller in scale, local access points to the NMP. They will be woven into the Gateways, where delivery can take place. Some of these physical assets exist already; our plan is to activate these assets aligned to the Gateways programme. It also offers the potential to develop protect, enhance and improve a number of community asset projects.

Based on the findings of our early desk research and consultation, below is an outline of the Activity Programme that we aim to test and revise in the Development Phase. We have grouped the activities under 8 programme headings, shown here in the summary table and explained in more detail below.

4.5.1 Summary

Programme	Development	Delivery [outline]
P1. Interpretation Plan	• Interpretation designers • Interpretation scheme	• Delivery of the Interpretation Scheme [fixed scheme]
P2. Smart Sound Heritage	• 6 Innovation Labs • Develop a marine observation post (Breakwater)	• Delivery of digital interpretation and solutions • Marine observation posts • Digital park apps

	• Hidden treasures of the sound project development • Develop a website "front door" for the park	• NMP website "front door"
P.3 Activate	• 2 x NMP Festival Weekend – open to everyone – e.g. swimming, sailing and paddle boarding • 30+ Pilot targeted Give it a Go event/s • 3 +Pilot walking events and challenges - potentially with digital innovation • 20 'Sea in the Park' events • Sea in the Park" engagement alongside existing PCC Public Events programme	• 5 x NMP Festival weekend, open to everyone • annual programmes (5) targeted Give it Go events key audiences • Annual programmes (5) of Walking events and challenges – potentially with digital innovation • Sea in the Park Programme • Public Events programme (enhancement of existing programme) e.g. Pirates weekend, seafood festival
P4 Communities	• 1 pilot neighbourhood project	• 5 x neighbourhood projects • Programme of community led intervention
P5 Community History	• 1 pilot community history project	• 4 x community history projects
P6 Enrich: enterprise support	• Case study review of the Future Parks • Taster 'meet-ups' for starter enterprises • Pilot sustainable fisheries initiatives	• Support network with skilled resources • Sustainable fisheries initiatives
P 7 Schools and Future Careers	• Involvement in 10 in-school activities • Involvement in 2 out of school – large scale activity • Primary school Ocean Citizenship programme support – content development	• Involvement in in-school activities • Involvement in out of school – large scale activity • Apprenticeship programme • Student work experience programme • Primary school Ocean Citizenship programme support – content development

P 8 Environmental Ambassadors	• Pilot Park Ranger team model • Pilot 'Community Focus Group' • Pilot Ocean Squad volunteer team • Pilot Heritage conservation team • Pilot programme of activities e.g. beach cleans, marine citizen science activities	• Park Ranger team model • Community Focus Group' • Ocean Squad volunteer team • Heritage conservation team • Programme of activities e.g. beach cleans, marine citizen science activities

For each programme P2 – P8 our Activity Planning consultants will help us undertake consultation with target groups to better understand the barriers to engagement for that programme. This is set out in section 4.6 below.

4.5.2 P1. Interpretation Plan

Development Phase

- Interpretation designers

We will appoint external **interpretation designers**, to develop a **unifying interpretation scheme,** based scheme based on the work of the Condition Survey and Statement of Significance, and on consultation with the NMP users and non-users. We anticipate a mix of interpretation at fixed points e.g. an exhibition at a welcome point and renew and refresh of static interpretation around the coastline, plus digital interpretation that can be accessed from any locations as well being integrated into the static scheme.

Delivery Phase

For the purposes of advance planning we have allocated resources to the following approach:

- Delivery of the Interpretation Scheme [fixed scheme]

4.5.3 P2. Smart Sound Heritage: digital innovation

- 6 Innovation Labs
- Develop a marine observation post (Breakwater)
- Hidden treasures of the sound project development
- Develop a website "front door" for the park

In order to maximise the exciting opportunities presented by digital technology we will creative 6 **Innovation Labs** that will bring together developers and users, and importantly engage with current non-users identified as our target audiences. We see opportunity to work closely with FE and HE digital students from a range of disciplines by creating 'challenge quests', so as to offer real world learning opportunities within this innovative environment.

Although not to prejudge the outcome of this work, we anticipate a digital 'front door' website as a basecamp for a set of digital tools and interpretation approaches for all our audiences. We know from our research that the public are keen for more **digital information** to support visits to the park (76% of survey respondents supported digital tide and weather information). This could be this could be presented within a **dashboard of data** within the website and as an app, drawing from a range of domains. For example, marine traffic (ships in the Sound); environmental readings from buoys; data from research projects such as seagrass bed development. In addition, it could include direct feed from webcams under and on the water – some newly installed, some pre-existing.

In addition, we envisage that the work of our innovation labs will take us beyond the realm of practical information to assist visits to the park and anticipate solutions to support many of our activity programmes. We anticipate **creative responses** emerging from 'dataplay[18]' style events and will ensure these events are also tailored to appeal to our target audiences e.g. SEND students and young people, and are portable; so as to reach our lower-income target neighbourhoods. Again, not to prejudge, but we anticipate the use of mixed and virtual reality perhaps within virtual mapping, game design, activity trails, film making or performance art.

Delivery Phase

For the purposes of advance planning we have allocated resources to the following approach:

- Delivery of digital interpretation and solutions including (examples)
    - Delivery of digital interpretation and solutions
    - Marine observation posts

[18] http://www.dataplymouth.co.uk/dataplay

- Digital park apps
- NMP website "front door"

4.5.4 P.3 Activate

Our Activate programme creates opportunity for everyone to get *on, in and under* the ocean in Plymouth.

Development Phase

- 2 x NMP Festival Weekend – open to everyone – e.g. swimming, sailing and paddle boarding
- 30+ Pilot targeted Give it a Go event/s
- 3 +Pilot walking events and challenges - potentially with digital innovation
- 20 'Sea in the Park' events
- Sea in the Park" engagement alongside existing PCC Public Events programme

We will run 2 NMP Festival pilot weekend events which will be aimed at **all audiences** and engage with **all audiences** via pop-up 'Sea in the Park' activity alongside the existing PCC public events programme.

In addition, we will run 30 pilot 'Give it a Go' events on the water and 3 pilot walking events / challenges (potentially with digital innovation). These events will focus on our **target audiences** and through evaluation and feedback we aim to better understand the value of the activity to our audiences and future barriers to engagement. This may include families and community groups from low-income neighbourhoods; community groups representing people with a disability; school cohorts with high numbers of SEND; and families and groups from a BAME background. We will promote this programme, and wider involvement with the NMP, at a series of 'Sea in the Park' events. Based on an existing model we will take a 'road show' approach to engaging families by joining family-friendly days in Plymouth parks located within lower-income neighbourhoods.

Plymouth is one of the UK's most popular diving spots and we will consult with divers and snorkellers to better understand how they can contribute to our project aims, potentially by checking underwater webcams and monitoring underwater indicators of climate change.

Delivery Phase

Based on our Development Phase findings, we will roll out our Activate programme to include:

- 2 x NMP Festival Weekend – open to everyone – e.g. swimming, snorkelling, sailing and paddle boarding

- annual programmes (5) targeted Give it Go events key audiences
- Annual programmes (5) of Walking events and challenges – potentially with digital innovation
- Sea in the Park Programme
- Public Events programme (enhancement of existing programme) e.g. Pirates weekend, seafood festival

4.5.5 P4 Communities

Development Phase

1 pilot neighbourhood project

We plan to focus on one lower-income estuarine neighbourhood to work closely with individuals, communities and schools within that locality to better understand the barriers to engagement with the heritage and landscape on their doorstep. Our first choice is Ernesettle, a lower-income neighbourhood located close to the Tamar and Tavy estuaries. Our early consultation with this community demonstrated the value of a previous 'Active Neighbourhood' project and the opportunity to build on this successful engagement work.

Delivery Phase

- 5 neighbourhood projects
- Programme of community-led intervention

Based on the findings of our pilot project we will roll this programme out to 5neighbourhoods over our 5 Year Activity Plan programme.

4.5.6 P5 Community History

Development Phase

1 pilot community history project

Building on the expertise of the Learning Team at The Box, we will deliver one mini-community history project in a lower-income area characterises by a 'hidden' or untold history of the Sound. Our early consultation has identified Saltash Passage as a potential location, with the communities of St. Budeaux and Saltash having an active interest in the history of the WW2 D Day Landings debarkation, and the posting of the American troops in the area.

Delivery Phase

4 community history projects

Based on the findings of our pilot project we will roll this programme out to 4 lower-income neighbourhoods over our 5 Year Activity Plan programme.

4.5.7 P6 Enrich: enterprise support

Development Phase

- Case study review of the Future Parks social enterprise model
- Taster 'meet-ups' for starter enterprises
- Pilot sustainable fisheries initiatives

Based on the learning of our successful Future Parks[19] model we will use the Development Phase to research and better understand the barriers to enterprise start-up, and the conditions and support required to further support a burgeoning network of marine environment-based enterprises. Pollenize[20] is a great example of the success of this approach as a nature-based initiative– what is the marine environment equivalent? We will run a set of taster 'meet-ups' in this phase to find out more.

We will commission a feasibility study to identify and appraise actions/projects that will support the sustainable development of Plymouth's fishing industry, including the possibility of sustainability accreditation such as Marine Stewardship Council (MSC) certification. The two preferred options will then be tested via pilot projects that will take place during the development phase. This could unlock a future for the local fishing industry based on environmental sustainability, as well as socio-economic benefit.

Delivery Phase

- Support network with skilled resources
- Sustainable fisheries initiatives

Based on the findings of the Development Phase and our learnings from the Future Parks social enterprise programme, we will create a support network with skilled resources to support start-up environmental-based enterprises around the NMP area.

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[19] https://www.plymouth.gov.uk/parksnatureandgreenspaces/parksprojects/futureparksacceleratorproject

[20] ttps://www.pollenize.org.uk

Based on the findings of the feasibility study and pilot projects, we will develop and deliver sustainable fishing projects that support the sustainable development of the local fishing industry.

4.5.8 P 7 Schools and Future Careers

Development Phase

- Involvement in 10 in-school activities
- Involvement in 2 out of school – large scale activity
- Ocean citizenship, Primary – development of content working with NMA to support their existing scheme of work.

Aligning with the Plymouth STEM Strategic Plan we will research and pilot a programme of engagement activities that profiles and prepares young people for marine technical (digital, engineering etc) careers.

Delivery of the Plymouth STEM plan creates interventions from Early Years to post 16+. In the Development Phase we will work closely with the STEM plan delivery team to identify where we can add value to the existing programme, our aim will be to profile opportunities within the marine technical sector and the qualification and training routes available.

We will ensure we focus our efforts on our target audiences, engaging specifically with students from lower-income neighbourhoods, BAME students and students with special educational needs.

We will review the engagement with and learning outcomes of the existing (NMA) primary school programme of Ocean Citizenship work; we consider there is a strong potential for digital content delivery via our Innovation Labs.

Delivery Phase

- Involvement in and out of school activities
- Build on existing NMP Ocean Citizen Programme for all Plymouth Primary schools
- Apprenticeship Programme
- Work experience Programme

Based on the findings of the Development Phase we will continue our involvement with the targeted delivery of the Plymouth STEM strategic plan, plus we will invest in apprenticeships

or training opportunities and enable secondary school students to undertake work experience placements. Our Development Phase work will pinpoint how, and with who we partner to deliver this aim.

4.5.9 P8 Environmental Ambassadors: Volunteering and Guardianships

Development Phase

- Pilot Assistant Park Ranger [see Resources 4.6 for detail]
- Pilot 'Community Focus Group'
- Pilot Ocean Squad volunteer team
- Pilot Heritage conservation team
- Pilot programme of activities e.g. beach cleans, marine citizen science activities

We will trial the appointment of an Assistant Park Ranger in the Development Phase who will lead volunteer recruitment. They will be responsible for the recruitment of a 'Community Focus Group' to ensure we keep in touch with the views of the public and our targeted communities; and a team of 'Ocean Squad' volunteers to support organised and independent conservation activity in the Park. The findings of our outline Condition Survey has demonstrated the need for on-going condition checking and routine maintenance which could of real interest to a trained heritage conservation volunteer team.

As well as reaching out to all our audiences, will specifically target engagement and volunteer recruitment from our target audiences and for example envisage linking to our network of well-being hubs and GP practices to support social prescribing and other physical and mental health related activities. We will ensure we work in unison with existing successful initiatives such as Plastic Free Plymouth[21]

The wider project will use the Development Phase to consider options for the location of a volunteer hub as a central place for volunteers and our 'Community Focus Group' members to meet and share knowledge and learning.

Delivery Phase

- 'Community Focus Group'
- Ocean Squad volunteer team
- Heritage conservation team

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- Programme of activities e.g. beach cleans, marine citizen science activities

Based on the findings of the Development Phase we will confirm our Park Ranger team, the recruitment of our volunteers and the programme of NMP-based environmental volunteering activities.

4.5.10 Partnerships and Collaborations

The formal partners for our project are:

Cornwall Council, Ocean Conservation Trust (National Marine Aquarium) and Mountbatten Watersports and Activity Centre.

4.6 Resources needed to support our activities

4.6.1 Development Phase: Staffing and Consultants

There will be **three new staff posts** to support activity at the Development Phase:

- Engagement Programme Manager [Activity Plan]. Grade I – 1FTE (22 months)
- NMP Pilot Park Ranger Grade H – 1FE (19 months)
- NMP Pilot Park Ranger Assistant (15 months)

In addition, the Development Phase will support **four internship positions**; NMP Seasonal Assistants. These positions are aimed at under-graduates or early career entrants. The Assistants will be aligned to one of four Gateways for 6 months:

- NMP Seasonal Assistant Park Ranger (Grade B) *Mount Edgcumbe*
- NMP Seasonal Assistant Park Ranger (Grade B) *Mount Batten*
- NMP Seasonal Assistant Park Ranger (Grade B) Tinside / Hoe
- NMP Seasonal Assistant Park Ranger (Grade B) *NMA*

Consultant Briefs:

Activity Planning consultants: to undertake stakeholder and community consultation to inform our Activity Plan programmes and author our Activity Plan. [ref to brief]

Interpretation designers: as detailed in P1 above.

Evaluation: to develop the evaluation framework and collect baseline data in the Development Phase. A break of contract, to be continued throughout the Delivery Phase should the project be awarded R1 funding.

4.6.2 Delivery Phase: Staffing

At present, the Delivery Phase staffing model has been founded on the basis of the Development Phase model.

4.6.3 Expenditure

Cost Heading	Budget: Development	Delivery
Resources: Staff	381,162	1,286,300
Resources: Briefs	486,500	-
Resources subtotal	**£867,662**	**1,0286,300**
P1. Interpretation Plan	Cross ref to briefs	£250,000
P2. Smart Sound Heritage/ Digital	£54,500	£1,500,000
P.3 Activate	£121,000	£1,267,000
P4 Communities	£3,000	£165,000
P5 Community History	£3,000	£40,000
P6 Enrich: Enterprise support	£40,000	£65,000
P 7 Schools and Future Careers	£4500	£187,500
P 8 Environmental Ambassadors	£23,500	£170,500
Activity Subtotal	**£249,500**	**£3,645,000**

4.7 Outcomes

Our project presents a practical response to the climatic threats to our environment and how we will engage all the people of Plymouth. Engaging residents and the wider community is key to changing the way a city interacts with its environment; to care for, protect it and use it in different ways to develop a healthier and more harmonious relationship with the ocean.

The table below summarises how we anticipate that this project could meet the NLHF Outcomes. We will evaluate and revise these outcomes through further consultation and the delivery of our pilot projects in the Development Phase.

NLHF Outcome	How the project will meet this outcome
A wider range of people will be involved in heritage	Our digital, public programming and marketing strands will engage with all residents and visitors to Plymouth, plus remote visitors via enhanced digital engagement. Our activity programmes aimed at our target audiences will increase motivation and build confidence to enable more people to positively engage with our coastal city and raise the profile of the NMP as a safe place for activity and well-being.
Heritage will be in better condition	We will commission a condition survey including statement of significance, to lead to prioritisation of repairs and renewals within a capital programme of key assets and explore methods to support owners to do the same.
Heritage will be identified and better explained	Based on the work of the statement of significance, the appointed interpretation designers will co-design an interpretation scheme to unlock vital knowledge and reconnect and inspire visitors and users of the Park. We will use the Development Phase to foster innovation and creativity in the delivery of digital solutions to our engagement mission so as to engage and inspire people regardless of their location.
People will have developed skills	Building on existing school programmes of Ocean Citizenship, we will ensure all Plymouth Primary School pupils are connect with the Ocean on their doorstep and inspired to get involved in our programmes. With a clear focus on STEM career development and 'blue economy start-up enterprise' we will elevate opportunities available to enable young people and career changers Through programmes aimed at our target audiences we will deliver approaches to levelling-up the access points to the higher-skilled marine tech sector by removing real and perceived barriers
People will have learned about heritage, leading to change in ideas and actions	To counter the extreme risk that faces our environment, we will pilot a programme of volunteering to hasten changes in attitude and behaviour, supporting city-wide our leadership in climate change action. Through engagement will all our audiences we will change the way the city interacts with its environment, to care and protect it.

People will have greater wellbeing	We will increase access to green and blue spaces in and around the Sound, encouraging all audiences and targeting our priority groups to participate. Our health and well-being hub will become a focus point for this engagement.
The funded organisation will be more resilient	This project will bring together key institutions across the park to collaboratively deliver our vision and give a more joined up coherent offer within the NMP. Our digital programme will build additional digital capability, skills and resilience.
The local area will be a better place to live, work or visit	Supporting the NMP, this project brings major sustainable development benefiting the economy, society and environment.
The local economy will be boosted	This project is a major economic and tourism driver, improving lives through connecting with our heritage and landscapes, and changing behaviours to reduce our impact on the environment, to restore it and improve it for generations to come

4.8 Evaluation

We will appoint an evaluation consultant to develop a monitoring and evaluation framework (a logic model and evaluation strategy) for the Development, Delivery and Operational phases of this project. This will ensure that we effectively and efficiently measuring our progress against key milestone and HLF outcomes and, where necessary, adapting our activities and programming.

During the Development Phase the consultant will undertake research (quantitative and qualitative) to produce a base-line set of data relevant to the draft outcomes in this plan, as well as an Evaluation Framework which will be used to inform the evaluation of the Delivery phase.

5 OUTLINE Action Plan: DEVELOPMENT Phase, August 2021 - July 2023

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
Resources and recruitment							
Recruitment of: Engagement Programme Manager [Activity Plan].	All audiences	Oversee planning to ensure outcomes defined	PCC Recruitment	£111,534	October 2021 – August 2023	Successful appointment and retention Pilot programme delivered Activity Plan and Interpretation Plan complete	Stakeholder interview
NMP Pilot Park Ranger	All audiences	A wider range of people will be involved in heritage	PCC Recruitment	£ 79021	Jan 2022 – August 2023	Successful appointment and retention	Stakeholder interview

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
		People will have greater wellbeing				Pilot programme delivered Evaluation data collected	
NMP Pilot Park Ranger Assistant	All audiences	People will have developed skills People will have learned about heritage, leading to change in ideas and actions	PCC Recruitment	£48,446	April 2022 – Sept 2023	Successful appointment and retention Pilot programme delivered Evaluation data collected	Stakeholder interview
4 x NMP Seasonal Assistants - internship positions	All audiences	People will have learned about heritage, leading to change in ideas and actions People will have	PCC Recruitment	£40703	May – Sept 2022	Successful appointment and retention Pilot programme delivered	Intern focus group

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
		developed skills				Evaluation data collected	
Activity Plan Consultant	All audiences / focus on priority audiences	A wider range of people will be involved in heritage & other outcomes defined	PCC Recruitment	£35,000	September 2021 – July 2023	Research and delivery of Activity Plan	Activity Plan compliant with NLHF guidelines
Evaluation Consultant	All audiences	A wider range of people will be involved in heritage & other outcomes defined	PCC Recruitment	£30,000	September 2021 – July 2023	Benchmarking of outcomes at Development Phase Preparation of evaluation Framework	Evaluation Framework compliant with NLHF guidelines
Interpretation Plan Consultant – scheme developed to concept stage	All audiences	Heritage will be identified and better explained	PCC Recruitment Mount Edgcumbe – Heritage gateway	20,000	September 2021 – July 2023	Working in unison with project team members and partners: research and delivery of	

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			NMA – Nature and Environment Cross Ref P2: Smart Sound Heritage			Interpretation Plan	
P1. Interpretation Plan							
Development of Interpretation Plan	All audiences	Heritage will be identified and better explained	Interpretation Planning consultants Mount Edgcumbe – Heritage gateway NMA – Nature and Environment Cross Ref P2: Smart Sound Heritage	Cross ref to Interpretation Brief	September 2021 – July 2023	Working in unison with project team members and partners: research and delivery of Interpretation Plan	Interpretation Plan to meet outcomes
P2. Smart Sound Heritage							

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
Select location and recruitment for 6 Innovation Labs:	Partnerships with digital sector + • Students (Secondary HE and FE) • lower include income neighbourhoods, • SEND students	Heritage will be identified and better explained A wider range of people will be involved in heritage People will have developed skills People will have learned about heritage, leading to change in ideas and actions	Engagement Programme Manager [Activity Plan]. Interpretation Plan consultant Activity Plan consultant Evaluation Plan consultant Mount Edgcumbe – Heritage gateway NMA – Nature and Environment Hoe Waterfront and Tinside – health and wellbeing hub	£20,000	October 2021 – June 2023	Delivery of protype digital tools to meet outcomes Students learned skills and gained understanding of career requirements for digital sector	Interview Evidence of prototypes - tested

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
Develop a marine observation post (Breakwater)	As above	As above	As above	£12,000	October 2021 – June 2023	Delivery of protype digital tools to meet outcomes	Interview Evidence of prototypes – tested
Hidden treasures of the sound project development	As above	As above	As above	£20,000	October 2021 – June 2023	Delivery of protype digital tools to meet outcomes	Interview Evidence of prototypes – tested
Develop a website "front door" for the park	As above	As above	As above	£2,500	October 2021 – June 2023	Delivery of website outline to meet outcomes	Interview Evidence of prototypes – tested
P.3 Activate							
• 2 x NMP Festival Weekend – open to everyone – e.g. swimming,	All audiences	A wider range of people will be involved in heritage	Mount Batton Peninsular – Active Recreation gateway	£44,000	May 2022	Number of participants Range of participants	Onsite feedback Post event survey

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
sailing and paddle boarding		People will have developed skills People will have greater wellbeing	Engagement Programme Manager [Activity Plan] NMP Pilot Park Ranger Assistant NMP Seasonal Assistant Park Ranger Mount Batten Evaluation consultant			Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	
• 30+ Pilot targeted Give it a Go event/s	• families with school age children from lower income neighbourhoods • disabled people • people from BAME backgrounds	A wider range of people will be involved in heritage People will have developed skills People will have greater wellbeing	Mount Batton Peninsular – Active Recreation gateway Hoe Waterfront and Tinside – health and wellbeing hub Engagement Programme	£52,000	May 2022 July 2022 August 2022	Number and range of participants Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	Onsite feedback Post event survey

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			Manager [Activity Plan] NMP Pilot Park Ranger Assistant NMP Seasonal Assistant Park Rangers Mount Batten / Tinside Evaluation consultant				
• 3 +Pilot walking events and challenges - potentially with digital innovation	As above	As above	As above	£3,000	May 2022 July 2022 August 2022		
• 20 'Sea in the Park' events	• families with school age children from lower income neighbourhoods	A wider range of people will be involved in heritage	Neighbourhood Anchor organisations Engagement Programme	£20,000	July 2022 August 2022	Number and range of participants Positive evaluation	Onsite feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
	• disabled people • people from BAME backgrounds	The local area will be a better place to live, work or visit People will have learned about heritage, leading to change in ideas and actions	Manager [Activity Plan] Pilot Park Ranger Assistant NMP Seasonal Assistant Park Ranger - team Evaluation consultant Interpretation Consultants (public research)			meeting outcomes Volunteer recruitment (cross ref P8)	
• "Sea in the Park" engagement alongside existing PCC Public Events programme	All audiences	A wider range of people will be involved in heritage The local area will be a better place to live, work or visit People will have learned about heritage,	PCC Events Team Engagement Programme Manager [Activity Plan] Pilot Park Ranger Assistant	£2000	May 2022 July –Sept 2022	Number and range of participants Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	Onsite feedback Feedback from Interpretation Designers

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
		leading to change in ideas and actions The local economy will be boosted	NMP Seasonal Assistant Park Ranger - team Evaluation consultant Interpretation Consultants (public research)				
P4 Communities							
• 1 pilot neighbourhood project (Ernesettle)	• families with school age children from lower income neighbourhoods • schools (primary and secondary) • disabled people	The local economy will be boosted The local area will be a better place to live, work or visit People will have greater wellbeing	Community Anchor organization (Ernesettle) Engagement Programme Manager [Activity Plan] Pilot Park Ranger Assistant Primary school	£3000	April 2022 – May 2023	Number and range of participants Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	Onsite feedback Focus group Stakeholder interviews Post project survey

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			Capital improvement programme				
P5 Community History							
• 1 pilot community history project (St. Budeaux / Saltash Passage)	• Individuals from lower income neighbourhoods • schools (primary and secondary)	People will have learned about heritage, leading to change in ideas and actions Heritage will be identified and better explained	Mount Edgcumbe – Heritage gateway The Box – Community Learning Team Engagement Programme Manager [Activity Plan] The Box – archival records P2: Smart Sound Heritage Community anchor	£3000	October 2021 – September 2022	Recruitment of volunteer research team Evidence of research findings Online exhibition / blog	Focus group Public feedback from online exhibition / blog

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			organization e.g. Plymouth Octopus Project				
P6 Enrich: enterprise support							
• Case study review of the Future Parks	Potential start-ups – from all audiences; priority audience – FE / HE graduates, Secondary school pupils	People will have developed skills People will have learned about heritage, leading to change in ideas and actions The local economy will be boosted	Engagement Programme Manager [Activity Plan] Future Parks Team NMA – Nature and Environment gateway	£5,000	Jan 2021 – May 2023	Case study complete: critical success factors understood	Interview Record keeping
• Taster 'meet-ups' for starter enterprises	Potential start-ups – from all audiences; priority audience – FE / HE graduates,	People will have developed skills	Engagement Programme Manager [Activity Plan]	£5,000	Jan 2021 – May 2023	Number of Taster meet-ups and number of target audience engaged	Interview Record keeping

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
	Secondary school pupils	People will have learned about heritage, leading to change in ideas and actions The local economy will be boosted					
• Pilot sustainable fisheries initiatives	Existing fisheries industries and start-ups / HE / FE graduates	People will have developed skills People will have learned about heritage, leading to change in ideas and actions The local economy will be boosted	Commissioned – feasibility study & pilot brief	£30,000	Oct 21 – Dec 23	Delivery of feasibility study and outputs of pilot initiatives	Stakeholder interview
P 7 Schools and Future Careers							

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
• Involvement in 10 in-school activities	• schools (primary and secondary) – focus on lower income neighbourhood • students (HE and FE) • focus on SEND students	People will have developed skills People will have learned about heritage, leading to change in ideas and actions	NMA – Nature and Environment gateway PCC STEM Learning team Engagement Programme Manager [Activity Plan] NMP Seasonal Assistant Park Ranger - team	£1,000	Jan 2022– July 2023	Number of schools engaged Number of pupils and students reach Range of pupils and students reached	Record keeping Onsite feedback Post event online survey feedback (teachers)
• Involvement in 2 out of school – large scale activity	As above	People will have developed skills People will have learned about heritage,	NMA – Nature and Environment gateway PCC STEM Learning team	£1000	Jan 2022 – July 2023	Number of schools engaged Number of pupils and students reach	Record keeping Onsite feedback Post event online survey feedback (teachers)

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
		leading to change in ideas and actions	Engagement Programme Manager [Activity Plan] NMP Seasonal Assistant Park Ranger - team Pilot Park Ranger Pilot Park Assistant			Range of pupils and students reached	
• Primary school Ocean Citizenship programme support – content development	• Primary schools	People will have developed skills People will have learned about heritage, leading to change in ideas and actions	The Box Learning Team NMA Learning Team Engagement Programme Manager [Activity Plan]	£2500	Jan 2022 – July 2023		

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			NMP Seasonal Assistant Park Ranger - team				
P 8 Environmental Ambassadors: Volunteering and Guardianship							
• Resources for Pilot Park Ranger Team to delivery P8	All audiences – with a focus on priority audiences: • families with school age children from lower income neighbourhoods • students (HE and FE) • disabled people • people from BAME backgrounds	People will have learned about heritage, leading to change in ideas and actions People will have developed skills People will have greater wellbeing Heritage will be in better condition	NMA – Nature and Environment gateway Mount Edgcumbe – Heritage gateway Hoe Waterfront and Tinside – health and wellbeing hub Engagement Programme Manager [Activity Plan]	£3,000	Feb 2021 – May 2023	Recruitment and numbers of volunteers for each role Evidence of delivery of programmes	Record keeping Onsite feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			Pilot Park Ranger Pilot Park Assistant P2: Smart Sound Heritage P1: Interpretation Planning				
• Recruitment pilot 'Community Focus Group'	All audiences with a focus on priority audiences – recruited via Programmes 2 – 7: • families with school age children from lower income neighbourhoods • students (HE and FE) • disabled people	People will have learned about heritage, leading to change in ideas and actions	P2: Smart Sound Heritage P1: Interpretation Planning Pilot Park Ranger Assistant Engagement Programme Manager [Activity Plan]	£500	May 2021 – May 2023	Evidence from Citizen Panel to shape programmes e.g. P1, P2, P8	Record keeping Onsite feedback Post group online survey feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
	• people from BAME backgrounds						
• Recruitment pilot Ocean Squad volunteer team	As Above	As Above	NMA – Nature and Environment gateway NMP Seasonal Assistant Park Ranger: NMA & Tinside	£15,000	May 2021 – May 2023	Recruitment from target audiences Retention from target audiences	Record keeping Onsite feedback Post pilot online survey feedback
• Recruitment pilot Heritage conservation team	As Above	As Above	Heritage capital restoration project lead Mount Edgcumbe – Heritage gateway	£2,000	May 2021 – May 2023	Recruitment from target audiences Retention from target audiences	Record keeping Onsite feedback Post pilot online survey feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			Pilot Park Ranger Assistant NMP Seasonal Assistant Park Ranger:				
• Pilot programme of activities e.g. beach cleans, marine citizen science activities / heritage conservation	As Above	As Above	NMA – Nature and Environment gateway Mount Edgcumbe – Heritage gateway	£3,000	May 2021 – May 2023	Delivery and evaluation of pilot programme	Record keeping Onsite feedback Post pilot online survey feedback

6 OUTLINE Action Plan: DELIVERY PHASE, Jan 2024 – Dec 2028

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
Resources and recruitment [Outline Plans – to be revised]							
Recruitment of: Engagement Programme Manager [Activity Plan].	All audiences	Oversee planning to ensure outcomes defined	PCC Recruitment	See total	Feb 2024 – Dec 2028	Successful appointment and retention Pilot programme delivered Activity Plan and Interpretation Plan complete	Stakeholder interview
NMP Park Ranger Model: • NMP Park Ranger • NMP Park Ranger Assistant	• All audiences	A wider range of people will be involved in heritage People will have greater wellbeing	PCC Recruitment	See total	March 2024 – Sept 2028	Successful appointment and retention Pilot programme delivered	Stakeholder Interview Intern focus group

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
• 4 x NMP Seasonal Assistants - internship positions		People will have learned about heritage, leading to change in ideas and actions People will have developed skills				Evaluation data collected	
Total Staff budget (Delivery Phase) Evaluation Contract in Development Phase				£1,286,300			
P1. Interpretation Plan							
Delivery of the Interpretation Scheme	All audiences	Heritage will be identified and better explained	PCC Recruitment Mount Edgcumbe – Heritage gateway NMA – Nature and Environment	£250,000	July 2024 – July 2025	Evidence of delivery of Interpretation scheme	Visitor surveys Staff feedback Visitor onsite feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			Cross Ref P2: Smart Sound Heritage				
P2. Smart Sound Heritage							
• Delivery of digital interpretation and solutions	All audiences	Heritage will be identified and better explained A wider range of people will be involved in heritage People will have developed skills People will have learned about heritage, leading to change in ideas and actions	Engagement Programme Manager [Activity Plan]. Park Ranger Mount Edgcumbe – Heritage gateway NMA – Nature and Environment Hoe Waterfront and Tinside – health and wellbeing hub	£900,000	May 2024 – July 2025	Evidence of delivery of digital interpretation and solutions	Visitor surveys Visitor onsite feedback Project Team feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
Develop a marine observation post (Breakwater)	As above	As above	Park Ranger NMA – Nature and Environment	£150,000	May 24 – Dec 2028	Evidence of data used to meet project outcomes	Record keeping Visitor interviews / survey
Digital Park Apps	As above	As above	Engagement Programme Manager [Activity Plan]. Park Ranger NMA – Nature and Environment	£300,000	May 2024 – July 2025	Analytics of App download and usage	Record keeping Visitor interviews / survey
Develop a website "front door" for the park	As above	As above	Engagement Programme Manager [Activity Plan].	£150,000	Jan 2024 – May 2024	Analytics of usage	Record keeping Visitor interviews / survey
P.3 Activate							

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
• 5 x NMP Festival weekends, open to everyone	All audiences	A wider range of people will be involved in heritage People will have developed skills People will have greater wellbeing	Mount Batton Peninsular – Active Recreation gateway Engagement Programme Manager [Activity Plan] NMP Park Ranger Assistant NMP Seasonal Assistant Park Ranger Mount Batten Evaluation consultant	£250,000	Summer 2024/5/6/7/8	Number of participants Range of participants Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	Onsite feedback Post event survey Coverage in media
• Annual programmes (5) targeted 'Give it Go' events for	• families with school age children from lower income neighbourhoods	A wider range of people will be involved in heritage People will have	Mount Batton Peninsular – Active Recreation gateway	£800,000	May 2024/5/6/7/8	Number and range of participants Positive evaluation	Onsite feedback Post event survey Coverage in media

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
priority audiences	• disabled people • people from BAME backgrounds	developed skills People will have greater wellbeing	Hoe Waterfront and Tinside – health and wellbeing hub Engagement Programme Manager [Activity Plan] NMP Park Ranger Assistant NMP Seasonal Assistant Park Rangers Mount Batten / Tinside Evaluation consultant			meeting outcomes Volunteer recruitment (cross ref P8)	Post events mini focus groups
• Annual programmes (5) of Walking events and challenges – potentially	As above	As above	As above	£22,000	May - Sept 2024/5/6/7/8	Number and range of participants Positive evaluation	Onsite feedback Post event survey Coverage in media

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
with digital innovation – open to everyone						meeting outcomes Volunteer recruitment (cross ref P8)	Post events mini focus groups
• Sea in the Park Programme	• families with school age children from lower income neighbourhoods • disabled people • people from BAME backgrounds	A wider range of people will be involved in heritage The local area will be a better place to live, work or visit People will have learned about heritage, leading to change in ideas and actions	PCC Events Team Engagement Programme Manager [Activity Plan] Park Ranger Assistant NMP Seasonal Assistant Park Ranger - team Evaluation consultant	£95,000	July 2024 - August 2028	Number of events attended Range of participants Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	Record keeping Onsite feedback Post event survey Coverage in media

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
• Sea in the Park" engagement alongside existing PCC Public Events programme	All audiences	A wider range of people will be involved in heritage The local area will be a better place to live, work or visit People will have learned about heritage, leading to change in ideas and actions The local economy will be boosted	PCC Events Team Engagement Programme Manager [Activity Plan] Park Ranger Assistant NMP Seasonal Assistant Park Ranger - team Evaluation consultant	£100,000	May 2024 - Sept 2028	Number and range of participants Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	Onsite feedback
P4 Communities							
• 5 x neighbourhood projects •	• All adults, families with school age children from	The local area will be a better place to live, work or visit	Community Anchor organisations	£15,000	May 2024 – Sept 2028	Number of projects and range of participants	Onsite feedback Focus group

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
	lower income neighbourhoods • schools (primary and secondary) • disabled people	People will have greater wellbeing People will have learned about heritage, leading to change in ideas and actions	Engagement Programme Manager [Activity Plan Park Ranger team			Positive evaluation meeting outcomes Volunteer recruitment (cross ref P8)	Stakeholder interviews Post project survey
• Programme of community led intervention	• All adults, families with school age children from lower income neighbourhoods • disabled people • people from BAME backgrounds •	A wider range of people will be involved in heritage The local area will be a better place to live, work or visit People will have learned about heritage, leading to	Engagement Programme Manager [Activity Plan] Park Ranger team	£150,000	May 2024 - Sept 2028	Number and range of interventions with target communities	Record keeping Onsite feedback Participant survey

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
		change in ideas and actions					
P5 Community History							
• 4 x community history projects	• Individuals from lower income neighbourhoods • schools (primary and secondary)	People will have learned about heritage, leading to change in ideas and actions Heritage will be identified and better explained	Engagement Programme Manager [Activity Plan Mount Edgcumbe – Heritage gateway The Box – Community Learning Team The Box – archival records P2: Smart Sound Heritage Community anchor organization e.g.	£40,000	May 2024 – Sept 2028	Recruitment of volunteer research teams Evidence of research findings Online exhibition / blog	Focus group Public feedback from online exhibition / blog

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
			Plymouth Octopus Project				
P6 Enrich: Enterprise support							
• Support network with skilled resources •	Potential start-ups – from all audiences; priority audience – FE / HE graduates, Secondary school pupils	People will have developed skills People will have learned about heritage, leading to change in ideas and actions The local economy will be boosted	Engagement Programme Manager [Activity Plan] NMA – Nature and Environment gateway	£15,000	Sept 2024 – Sept 2028	Number of start ups Number of start- ups sustained Contact with support network	Interview Record keeping Digital analytics
• Sustainable fisheries initiatives	Existing fisheries industries and start-ups / HE / FE graduates	People will have developed skills People will have learned	Engagement Programme Manager [Activity Plan]	£50,000	Sept 2024 – Sept 2028	Number of fishery initiative start-up Measures of resilience of	Interview Record keeping

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
		about heritage, leading to change in ideas and actions The local economy will be boosted				existing fishing industry	
P 7 Schools and Future Careers							
• Involvement in in-school activities [TEM Careers]	• schools (primary and secondary) – focus on lower income neighbourhood • students (HE and FE) • focus on SEND students	People will have developed skills People will have learned about heritage, leading to change in ideas and actions	NMA – Nature and Environment gateway PCC STEM Learning team Engagement Programme Manager [Activity Plan] Park Ranger Team	£20,000	May 2024 – July 2028	Number of schools engaged Number of pupils and students reach Range of pupils and students reached	Record keeping Onsite feedback Post event online survey feedback (teachers)

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
• Involvement in out of school – large scale events [STEM Careers].	As above	People will have developed skills People will have learned about heritage, leading to change in ideas and actions	NMA – Nature and Environment gateway PCC STEM Learning team Engagement Programme Manager [Activity Plan] Park Ranger Team	£7,500	May 2024 – July 2028	Number of schools engaged Number of pupils and students reach Range of pupils and students reached	Record keeping Onsite feedback Post event online survey feedback (teachers)
• Primary school Ocean Citizenship programme support – content	• Primary schools	People will have developed skills	The Box Learning Team NMA Learning Team	£25,000	Sept 2024 – Dec 2028	Number of schools engaged Number of pupils and students reach	Record keeping Analytics for digital resource usage

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
development (digital and practical)		People will have learned about heritage, leading to change in ideas and actions	Engagement Programme Manager [Activity Plan] Park Ranger Team			Range of pupils and students reached	Online survey feedback (teachers)
• Apprenticeship programme	• Students (HE and FE) • Secondary schools	People will have developed skills The local economy will be boosted The local economy will be boosted	With FE – e.g. Plymouth City College Engagement Programme Manager [Activity Plan]	£100,000	Sept 2024 – August 2028	Number of Apprenticeships Take up of apprenticeships Retention of apprenticeships	Record keeping Feedback from Apprentice Feedback from Employer
• Student work experience programme	• Students (HE and FE) • Secondary schools	People will have developed skills The local economy will be boosted	Engagement Programme Manager [Activity Plan] Park Ranger	£35,000	Sept 2024 – August 2028	Number of Placements Take up of apprenticeships	Feedback from Student Feedback from Employer

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
P 8 Environmental Ambassadors: Volunteering and Guardianship							
• Resources for Park Ranger Team to delivery P8	All audiences – with a focus on priority audiences: • families with school age children from lower income neighbourhoods • students (HE and FE) • disabled people • people from BAME backgrounds	People will have learned about heritage, leading to change in ideas and actions People will have developed skills People will have greater wellbeing Heritage will be in better condition	Transport – electric vehicle etc. NMA – Nature and Environment gateway Mount Edgcumbe – Heritage gateway Hoe Waterfront and Tinside – health and wellbeing hub	£18,000	May 2024 – Oct 2028	Evidence of delivery of P8 programmes	Record keeping Onsite feedback Participant surveys
• 'Community Focus Group' – ongoing	All audiences with a focus on priority audiences – • families with school age	People will have learned about heritage, leading to	Assistant Park Ranger Evaluation Consultant	£2,500	June 2024 – August 2028	Sustained Community Focus group	Record keeping Online volunteer

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
	children from lower income neighbourhoods • students (HE and FE) • disabled people • people from BAME backgrounds	change in ideas and actions					survey feedback Evidence via Focus group activity
• Ocean Squad volunteer team	As Above	As Above	NMA – Nature and Environment gateway Park / Assistant Park Ranger	£125,000	May 2024 – Oct 2028	Recruitment from target audiences Retention from target audiences Number of engagement activities Evidence of delivery e.g. weight of plastic picked etc.	Record keeping Onsite feedback Online volunteer survey feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
• Heritage conservation team	As Above	As Above	Assistant Park Ranger Mount Edgcumbe – Heritage gateway	£10,000	May 2024 – Oct 2028	Recruitment from target audiences Retention from target audiences Retention from target audiences Number of engagement activities Evidence of delivery e.g. conservation of built heritage	Record keeping Onsite feedback Online volunteer survey feedback
• Programme of activities e.g. beach cleans, marine citizen science activities /	As Above	As Above	NMA – Nature and Environment gateway Mount Edgcumbe –	£15,000	May 2024 – Oct 2028	Evidence of delivery e.g. conservation of built heritage	Record keeping Onsite feedback

Activity: description	Target audience for activity	Outcome – what change will there be?	Resources	Costs in project budget	Timetable	Targets & measures of success	Method(s) of evaluation
heritage conservation			Heritage gateway Assistant Park Ranger				Online volunteer survey feedback

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Date of meeting:	08 December 2021
Title of Report:	**Culture Plan Update**
Lead Member:	Councillor Mark Deacon (Cabinet Member for Customer Services, Culture, Leisure & Sport)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Hannah Harris
Contact Email:	hannah@plymouthcultue.co.uk
Your Reference:	HH - Dec21
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report
The purpose of the report is to provide an update on cultural provision across the city with particular reference to community engagement and geographical reach.

Recommendations and Reasons

The committee notes the report and:
1) Actively supports the development and delivery of BAS9 as a cross city, transformational engagement programme

Endorses the Cultural Partnership, lead by Plymouth Culture, to steer the implementation of the Culture Plan.

Reason - to ensure that the committee is kept up to date with progress on the Culture Plan

Alternative options considered and rejected
Not applicable - update report

Relevance to the Corporate Plan and/or the Plymouth Plan
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 has 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:
No financial implications directly related to this report

Financial Risks
No financial risks directly related to this report

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) *If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
		1	**2**	**3**	**4**	**5**	**6**	**7**
A	Briefing report title							
B	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 <u>unpublished</u> 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 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
	1	**2**	**3**	**4**	**5**	**6**	**7**

Sign off:

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Originating Senior Leadership Team member: David Draffan (Service Director Economic Development)

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

Date agreed: 26/11/2021

Cabinet Member approval: Councillor Mark Deacon (Verbally)

Date approved: 24/11/2021

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Culture Plan Update
Appendix A: Briefing Report

1.0 Introduction
The Culture Plan (Appendix 1) 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 co-design process was conducted between April 2020 - January 2021 with the support of external facilitators, Arts Development Company Dorset, and included:
- 40 one-to-one interviews with stakeholders
- 3 facilitated workshops
- 3 consultation workshops
- 5 focus groups (conducted with the support of partner organisations Barbican Theatre Plymouth, Funky llama Steering Group, Beyond Face, students from Plymouth Marjon University and the Free-lance Taskforce)

To support the development of the Culture Plan, Plymouth Culture commissioned the Audience Agency to collate and analyse data relating to cultural audiences, Plymouth residents and the cultural sector. This was designed to better understand the economic and social impact of the sector across the city and begin the process to using data to drive decision making within the sector. It is this work that forms the basis of this report and will be discussed in further detail.

2.0 Culture Plan Priorities
The Culture Plan has at its core a focus on people, place and planet. As a direct response to the Arts Council Let's Create Strategy and in alignment with the Plymouth Plan, Plymouth residents are at the forefront of the Culture Plan. This is reflected throughout the document and is not simply about growing audiences but is about genuine engagement leading to co-creation.

The Vision
Plymouth is a magnet city, attracting artists, creatives and social activists. Our city's appeal is characterised by our commitment to people and planet and evidenced by our unique cultural offer that reflects, includes and values our diverse communities.

Key Driver
We will use culture and creativity to nurture community engagement, building happy, healthy, empowered and connected communities.

Ambition Statements
We will make cultural encounters part of the everyday for everyone.

We will develop an exemplary model of co-creation where our audiences are active participants, making our cultural offer authentic and relevant.

We will embed equality at every level of the sector to actively support diversity of voice and celebrate the creativity in everyone.

3.0 Data - Cultural Audiences
The research commissioned by Plymouth Culture, in support of the Culture Plan development, provides an overview of engagement levels as well as audience segmentation to indicate potential audiences and likely engagement (See Appendix 2).

In summary, the report describes the cultural engagement of the population of Plymouth as more youthful than in comparator cities, in line with the general demographic of the city, and of a social demographic that shows a mix of more moderate engagement with culture, typical of the South West region, with an injection of more culturally-engaged 'Experience Seekers' typical of a university city.

The more detailed analysis in the report shows the gender balance amongst Plymouth residents is the same as across England as a whole; but amongst those engaging with culture at Plymouth orgs, females are over-represented.

Overall, Plymouth skews slightly younger than England as a whole, with a larger proportion of 16-24s and a smaller proportion of those aged 25-64. This is amplified in the age profile of culturally active Plymouth residents, which has a significant over-representation of 16- 24 year olds. This is not a picture that has previously been reflected in the Plymouth Survey when young people have been asked about the pride they have in Plymouth's history or if they feel there is a lot to do in the city; which has previously been equated to engagement in culture.

Plymouth is less ethnically diverse than England as a whole, but the profile of those engaging with culture in Plymouth is more diverse than we would see if all ethnic groups took part in proportion to their size in the population. All ethnic groups other than White British are over-represented amongst Plymouth-resident cultural attenders, in particular those who identify as Asian or Asian British.

Plymouth has slightly higher levels of disability amongst the population than found across England as a whole. This is not the case amongst cultural attenders, where we see an under-representation of those whose daily activities are limited by a long-term illness or disability.

This data report is useful to gain an overview of whether or not the audiences of cultural organisations are proportionally representative of the population of Plymouth. However, as is outlined in the report, this data was drawn from only five cultural organisations at the time, who return data through Audience Finder and is therefore limited (Plymouth Arts Cinema, Theatre Royal Plymouth, Barbican Theatre Plymouth, KARST and Real Ideas).

To provide a wider understanding of the audience profile, that goes beyond characteristics and considers preferences and behaviours, the report also considered Plymouth residents and audiences in terms of the Audience Spectrum. It concluded that:

- Plymouth has an over-representation of less-engaged Audience Spectrum segments. 21% of adults fall into one of the 'Highly engaged' Audience Spectrum segments, 42% a Medium Engagement segment, 37% a Lower Engagement segment. This compares with 25%, 41% and 33% of adults in England as a whole.
- According to the TGI (Target Group Index) survey, adults in Plymouth are less likely than those elsewhere in England to attend almost all areas of arts and culture – most notably Opera, Museums, Jazz, Classical music, Ballet, and Theatre.
- The profile overall for Plymouth cultural organisations broadly reflects the Plymouth population, but there are some notable differences:
    - The highly engaged Experience Seekers are over-represented (27% of Plymouth residents at Plymouth organisations vs. 16% in the population)
    - The medium engaged Trips & Treats group slightly under-represented (18% vs. 21% of all Plymouth residents)
    - The less engaged Facebook Families segment is more under-represented (7% of the Plymouth-resident audience vs. 14% of the population)
    - The three largest Audience Spectrum segments are Experience Seekers, Trips & Treats and Dormitory Dependables (13%).

4.0 Social Impact and Community Engagement

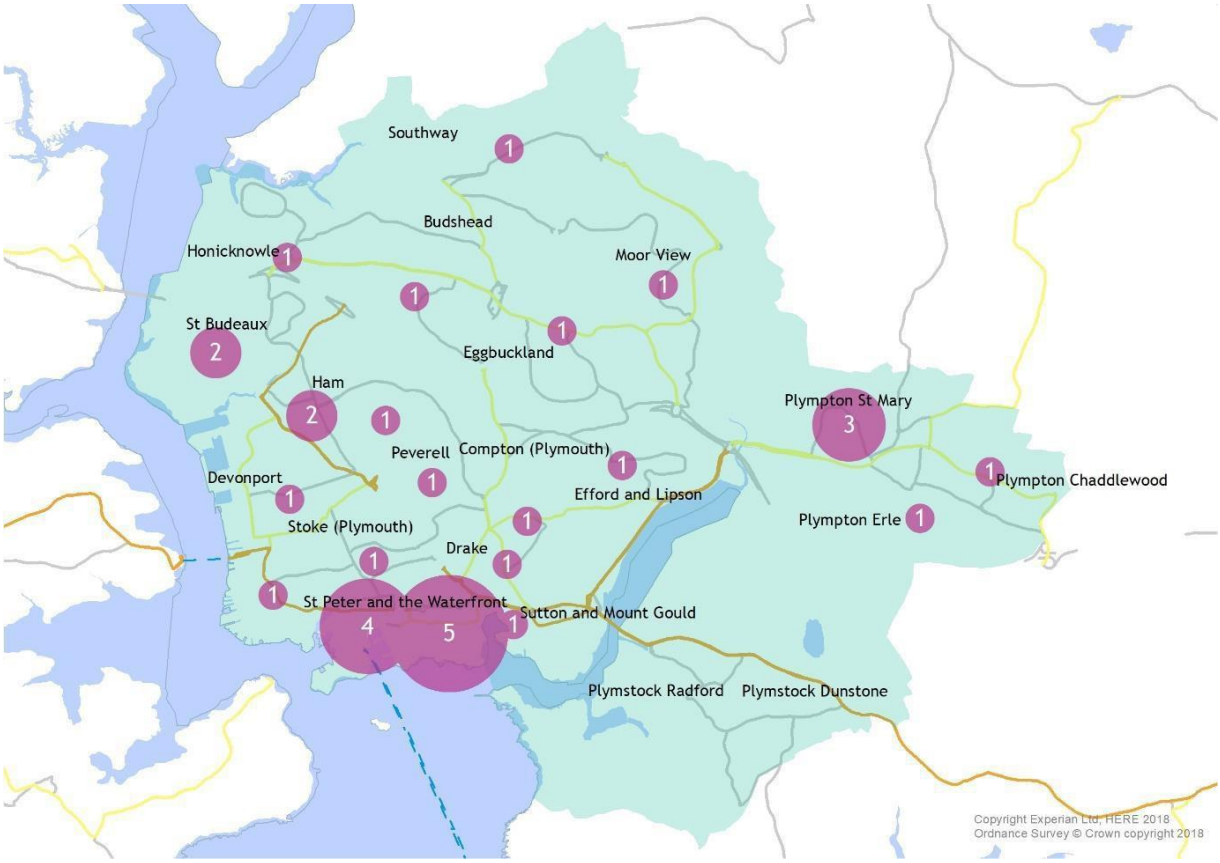
One of the key drivers for PCC's investment in culture continues to be the desire to engage new audiences, reaching every corner of our Plymouth communities to support inclusivity and community cohesion.

The data report started to show some early mapping of engagement cold spots across the city. For example we know that in general terms communities least likely to engage in culture, categorised by the audience agency as Kaleidoscope Creativity and Facebook Families, are located within the North of the City, Devonport and pockets of the City Centre. Whilst these audiences are less likely to see art as important to their lives, they will often engage in community festivals and music, which in both categories can be considered a gateway cultural offer. In fact Nationally these segments account for up to 20% of ticket income for music events/performances. (Source: Audience Finder Ticketing Data 2018-19)

It is important, therefore, to recognise that attendance at the city's ticketed or paid for or venue based cultural programmes is not the only measure of cultural engagement across the city. In fact, communities all over Plymouth have access to, and are engaging with, an extensive range of cultural opportunities. This was strongly reflected within the Social Impact report produced by The Audience Agency to accompany the Culture Plan (See Appendix 3).

Social impact is clearly high on the agenda for most cultural organisations in the city, and there is an understanding of the responsibility of cultural organisations to engage and connect the less culturally active in 'usual' times, that has developed into considerable 'duty of care' activity during the pandemic. As the map shows, even just this small selection of cultural organisations have an extensive reach across Plymouth:

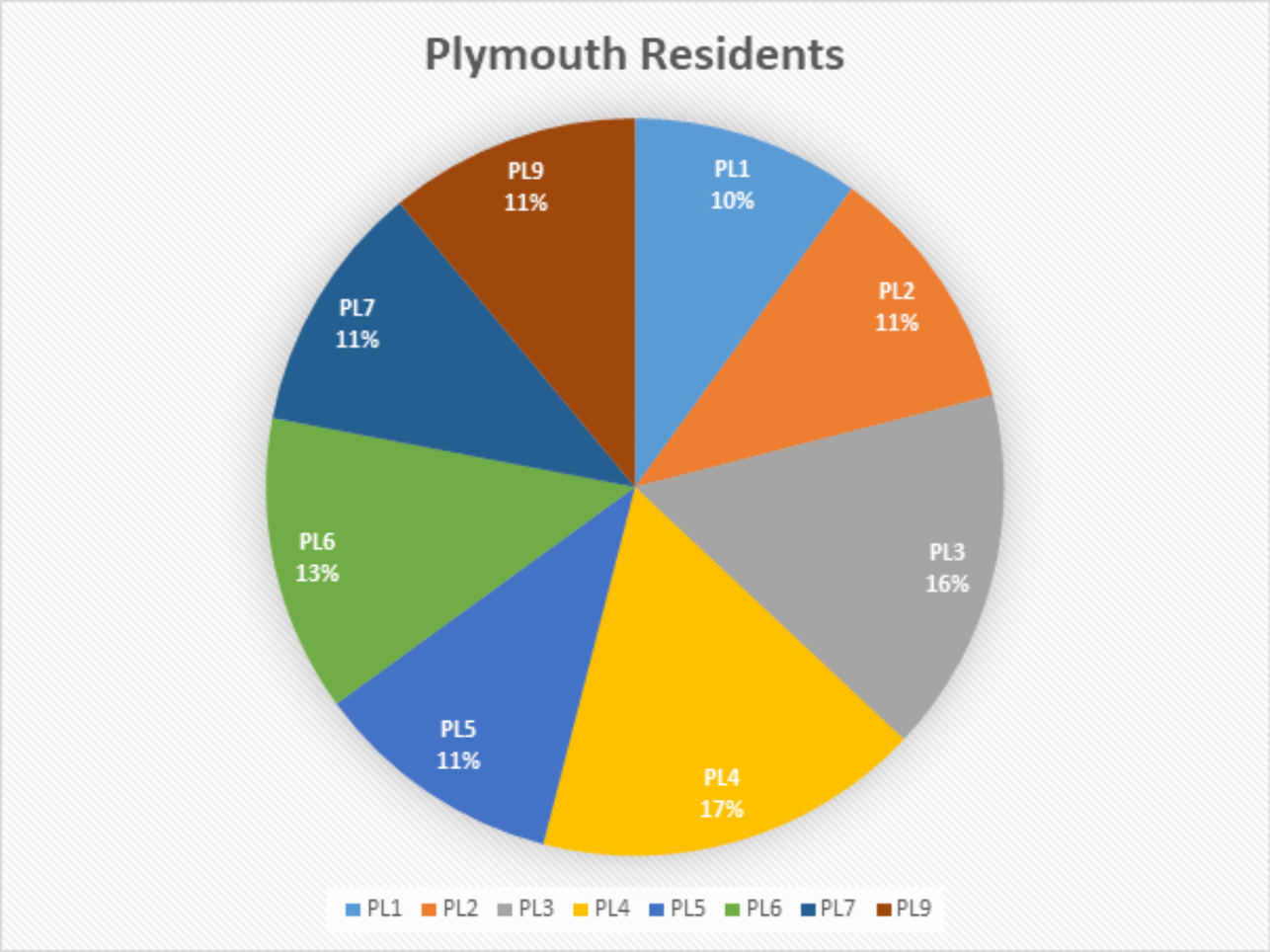
Number of organisations interviewed who are focusing work in each postal sector



As the Social Impact report shows we have many examples of outstanding community engagement within the cultural sector that we could discuss. In addition to those listed in the report it is worth considering The Box, Mayflower 400 Sparks and Illuminate.

4.1 The Box

When it opened in September 2020 The Box welcomed 33k visits up until December 2020, 77% of which were by Plymouth residents. Continued Covid related closures meant that the venue did not open again until 18th May 2021 but since then has received 100k visits; 37k visits to the Mayflower400: Legend & Legacy exhibition with 27.19k of these from Plymouth residents. A similar pattern is emerging for the recently opened Songlines exhibition which has seen 7k visits, 3.6k from Plymouth residents. In terms of the geographical spread of the Plymouth visitors this is relatively even across all Plymouth postcodes:

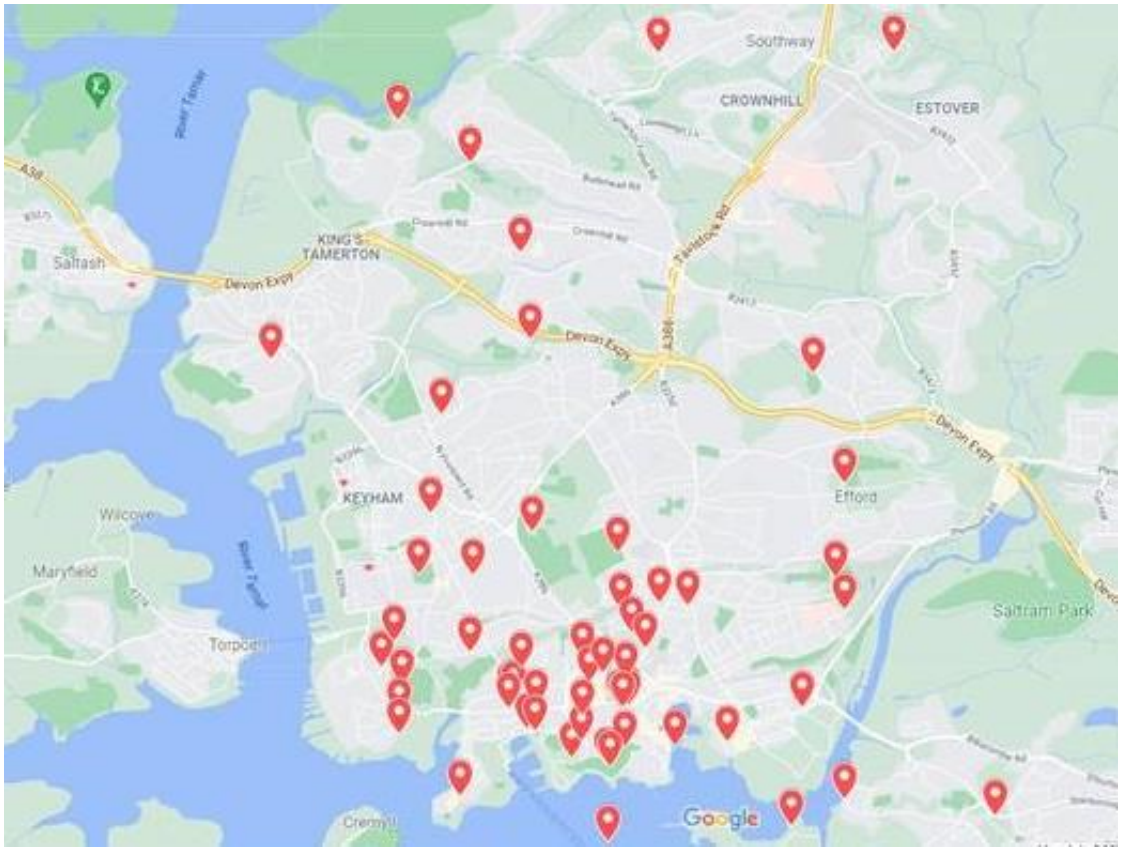


In addition to the visitor numbers The Box's learning and engagement team has delivered 66 sessions to over 2,050 children and young people via schools visits since April 2021. A further 103 sessions, events or activities have also been delivered reaching 27,000 people both on and off-site. The majority of the teams work has been delivered to children, young people and families (especially during school holidays) however a number of sessions targeted people of low socio-economic status, older people, LGBTQ+ people and people who needed additional health and wellbeing support.

4.2 The Mayflower 400 Community Sparks

The Mayflower 400 Community Sparks programme provided financial support to grass-roots community, arts and cultural organisations/groups for projects that celebrate heritage, enrich local communities, and align with the Mayflower themes of imagination, humanity, freedom and future. A total of 60 projects were commissioned; whilst the vast majority were able to go ahead, unfortunately ten were cancelled due to the pandemic. In terms of impact, the Community Sparks projects engaged with over 48,000 people including residents from every Plymouth postcode area, covering all ages, and a diverse range of ethnicities, genders and sexualities. The programme builds on the vital sparks fund and is a model which can be deployed to other initiatives, such as the recent Heritage Sparks Fund, to support communities to engage with and devise their own cultural projects that are authentic and relevant to them.

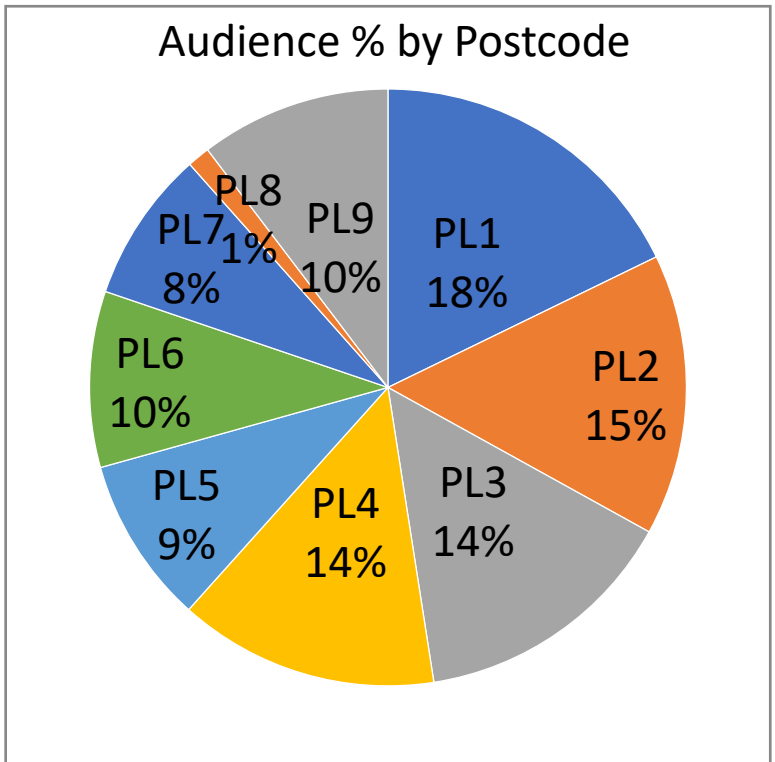
The map below illustrates where in Plymouth each of the projects were delivered:



4.3 Illuminate

Illuminate light festival took place from 15th - 28th November 2021. Although staged differently this year the event has been incredibly successful with total audiences of over 26k and attendances of over 25k to the live events programme. Of these audiences more than 84% are from Plymouth with a relatively even split across all postcodes with the exception of PL8:

Although each project mentioned above is very different the principals are the same, engage communities around issues, thematics and topics that matter to them and use Plymouths unique heritage as-



sets to explore these and create artistic responses that can be shared with the wider community to extend conversation. It is this embedded, long term approach that will build sustainable audiences for the cultural offer in the city.

5.0 Further Developments

As has been acknowledged, this data is useful and starts to provide a picture of cultural delivery and engagement across the city. However, it has its limitations as it is based on a sample of only five cultural organisations and census information from 2011. In order to further our understanding of audience engagement and geographical reach Plymouth Culture and The Box are leading a piece of work to commission a further research and impact study. This will build on the data presented here but consider the data of more cultural organisations and overlay this with other city data such as the Indices of Multiple Deprivation (IMD) to better understand engagement, barriers and opportunities.

This newly commissioned research is to be conducted ahead of the British Art Show 9 (BAS9) so that we can use this exhibition as a pivotal moment to not only expand but diversify our cultural audiences. The data will help to design and target engagement activity so that it is authentic and creates a sustained shift in the way the cultural sector reaches and engages audiences. The BAS9 partners are developing an engagement framework to ensure that every aspect of the audiences journey is relevant and accessible, from community delivery, to marketing, to interpretation; and that this approach is embedded beyond BAS9.

6.0 Culture Plan

This approach to using data to drive decision making and build a more participatory model of engagement is central to the Culture Plan. To further support the work to embed this approach Plymouth Culture has established a cross city, cross sector Cultural Partnership to steer the implementation of the Culture Plan. One of the key areas of work for this steering group will be to support and champion the development and roll out of this participatory engagement model, leading to more diverse, engaged and sustained audiences for culture across the city.

Whilst we know there is a lot of work to do, our priority work programme for 2022/23 will include:

- Realising the full potential of BAS9 as a city wide initiative designed to engage new audiences through community focused arts projects. (Culture Plan work programme - ‘Culture is alive’).
- Commissioning, analysing and sharing cultural data to help tell the story of the true impact of culture and to target future resources and activities. (Culture Plan work programme - ‘Data story telling’).
- Testing new locations for culture in outdoor and unusual locations to improve access and ensure our cultural offer makes the most of our natural and built environments (Culture Plan work programme - ‘Our city is our venue’).
- Aligning the cultural engagement activity with the National Marine Park Horizon programme for an effective community engagement strategy. (Culture Plan work programme - ‘Our city is our venue’).
- Building this data, knowledge and learning into the applications from National Portfolio Organisations (NPO) to the next round of Arts Council England (ACE) funding. This work is strategically aligned to the four Investment Principles set out by ACE and will demonstrate that Plymouth has a progressive and relevant cultural offer.

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CULTURE PLAN
DATA REPORT

PRODUCED
2020/21

A place-based Culture Strategy

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Background 3
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INTRODUCTION

Background

Plymouth Culture commissioned The Audience Agency to collect, analyse and present data relating to the arts and culture sector in Plymouth, providing a robust and shared narrative about the value and reach of the sector and up-to-date information to support their strategic plans. This includes information on the economic and social impact of cultural provision, audience reach, and the benchmarking of Plymouth against other relevant UK cities.

Overall, the aim of this project is:

To make sure agreed priorities and decisions around investments are backed up by hard evidence, brought together in one place for the sector and stakeholders to use as a reference point and a useful resource for all partners as well as directly influencing the shape of the culture strategy.

This report brings together **population analysis** (including Census, Audience Finder, and Target Group Index survey data), **cultural provision** and business data (from the Inter- Departmental Business Register as well as desk research and an organisation survey), and the results of interviews with cultural service providers in Plymouth to address the **social impacts** of the sector.

The following chapters explore each of these areas in turn, with appendices giving more detail for further exploration or context.

Demographics

Headlines

- Compared to England as a whole, the population of Plymouth skews slightly younger, with 33% being aged under 25 compared with 31% nationally. 18-29 year-olds are particularly over-represented, making up 20% of Plymouth residents and 16% of England's population
- 13% of Plymouth residents are full-time students, compared with 9% across England as a whole
- Plymouth residents are more likely than the England average to have 'Bad' or 'Very bad' health (7% vs 5% of the England population), and more likely to have a limiting long-term health problem or disability (20% of residents vs. 18% across England as a whole)
- Of Plymouth residents not in employment or seeking work, 16% are long-term sick or disabled. This compares with 13% across England.
- They are also slightly more likely than the national average to provide unpaid care – 11% doing so vs 10% across England
- 51% of households fall into the C2/D/E social grade, compared with 46% of all England households. 29% work in routine or semi-routine occupations, compared with 25% of all 16-74 year olds in England
- Compared with England as a whole, a larger proportion of Plymouth residents work in skilled trades (13% vs 11% England), caring, leisure and other service occupations (11% vs. 9%) and sales and customer service occupations (11% vs. 8%)
- 21% of residents hold degree-level qualifications, compared with 27% of the England population.

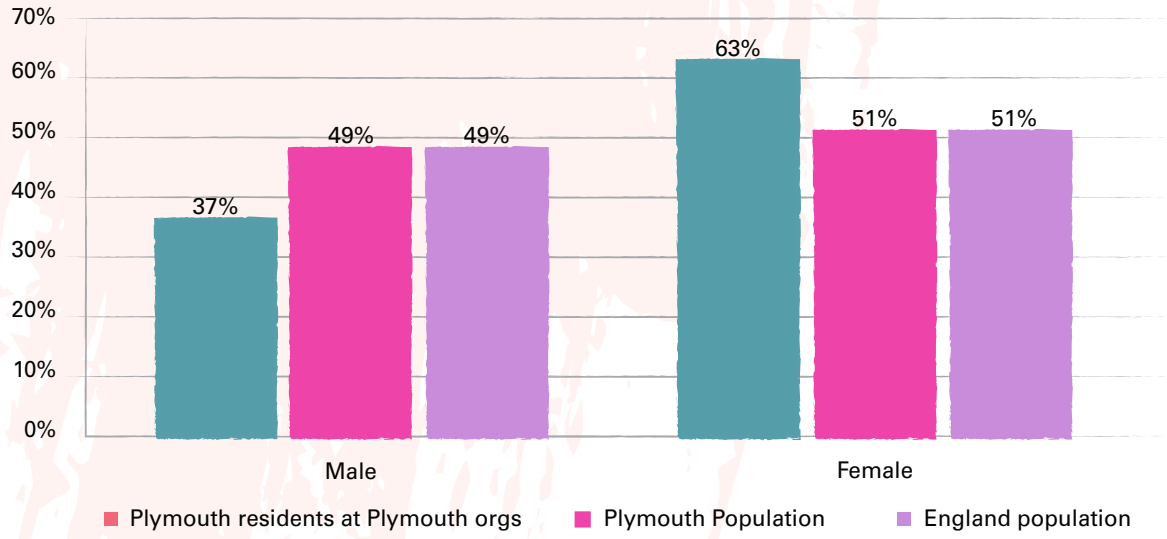
The following charts describe the demographic profile of:

- Plymouth-resident audiences at Plymouth arts and cultural organisations (based on Audience Finder survey data since 2016)
- The adult (15+) population of Plymouth
- The adult (15+) population of England

Data is also available for all audiences at Plymouth arts and cultural organisations regardless of where they live, and Plymouth residents at all Audience Finder venues anywhere in the UK. These are both available in the appendices and are based on Audience Finder survey data since 2016.

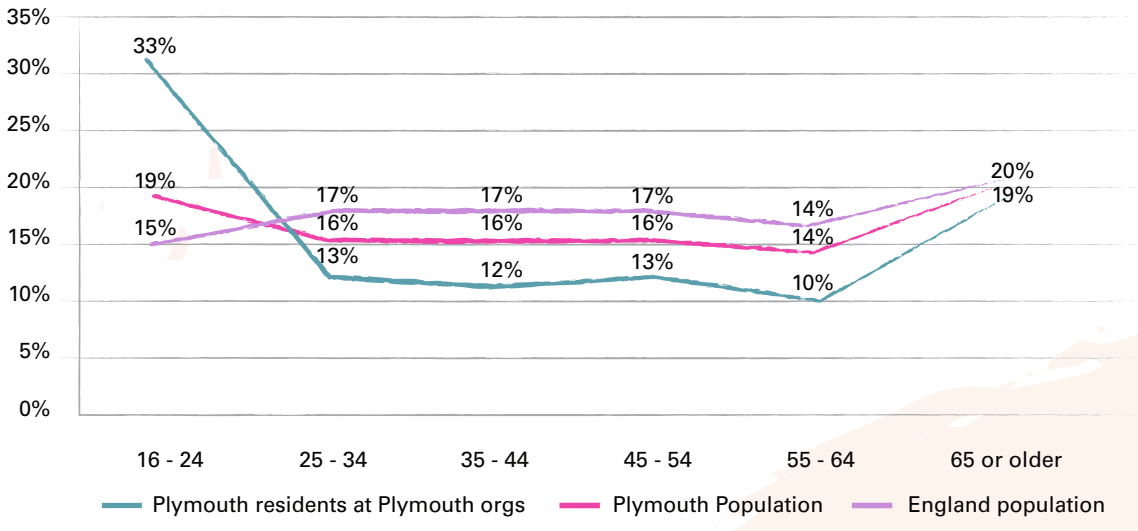
Gender

The gender balance amongst Plymouth residents is the same as across England as a whole. Amongst those engaging with culture at Plymouth orgs, females are over-represented.



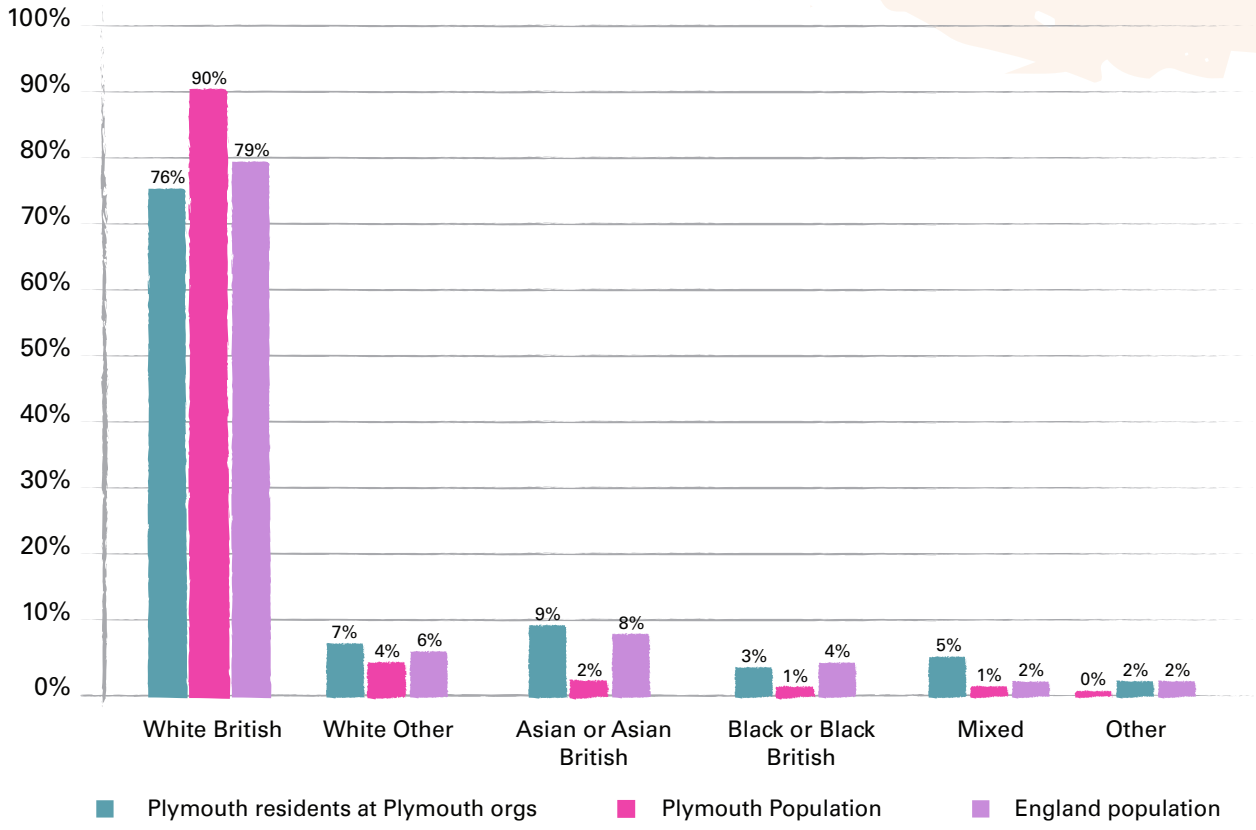
Age

Overall, Plymouth skews slightly younger the England as a whole, with a larger proportion of 16-24s and a smaller proportion of those aged 25-64. This is amplified in the age profile of culturally active Plymouth residents, which has a significant over-representation of 16- 24 year olds.



Ethnicity

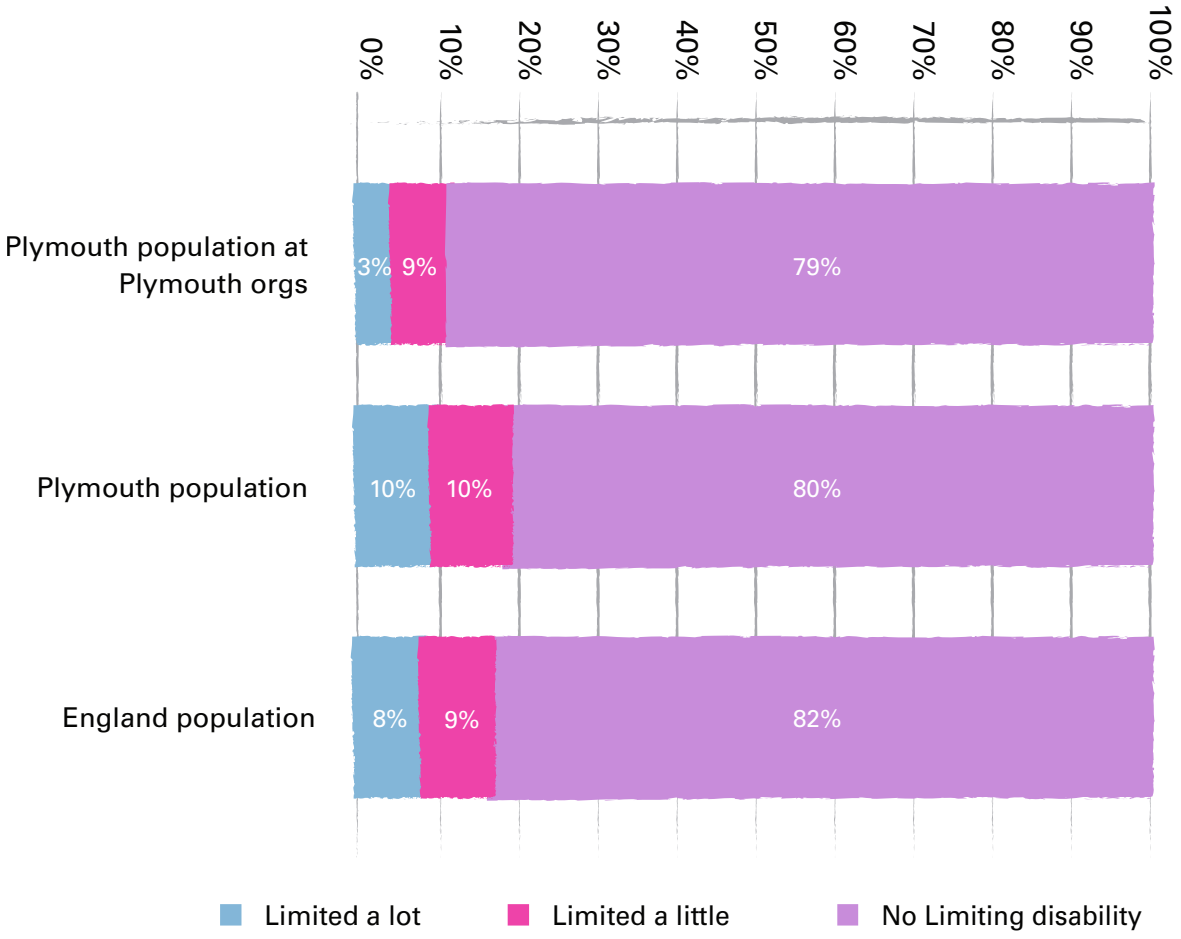
Plymouth is less ethnically diverse than England as a whole, but the profile of those engaging with culture in Plymouth is more diverse than we would see if all ethnic groups took part in proportion to their size in the population. All ethnic groups other than White British are over-represented amongst Plymouth-resident cultural attenders, in particular those who identify as Asian or Asian British.



Note: mid-year 2016 estimates have been used for ethnic origin of the Plymouth and England populations

Disability

Plymouth has slightly higher levels of disability amongst the population than found across England as a whole. This is not the case amongst cultural attenders, where we see an under-representation of those whose daily activities are limited by a long-term illness or disability.



Engagement with arts and culture

Headlines

- Plymouth has an over representation of less-engaged Audience Spectrum segments. 21% of adults fall into one of the 'Highly engaged' Audience Spectrum segments, 42% a Medium Engagement segment, 37% a Lower Engagement segment. This compares with 25%, 41% and 33% of adults in England as a whole.

- According to the TGI survey, adults in Plymouth are less likely than those elsewhere in England to attend almost all areas of arts and culture – most notably Opera, Museums, Jazz, Classical music, Ballet, and Theatre.

The following figures are based on surveys undertaken by five Plymouth arts organisations.

- Plymouth audiences are predominantly female (63% compared to 37% male visitors).

- Plymouth audiences are younger than the Plymouth and English population, 33% being aged 16 to 24 compared to 12% of the Plymouth population being in this age range.

- Plymouth audiences are more diverse than the Plymouth population. There are more people with an Asian/Asian British (9%), Mixed (5%) or Black/Black British (3%) background amongst the audience than in the Plymouth population (each 2% or less).

- Compared with all Plymouth residents, a smaller proportion of the arts/culture" audience have a limiting disability (12% vs. 20%)

- The profile overall broadly reflects the Plymouth population, but there are some notable differences:

- The highly engaged Experience Seekers are over-represented (27% of Plymouth residents at Plymouth organisations vs. 16% in the population)

- The medium engaged Trips & Treats group slightly under represented (18% vs. 21% of all Plymouth residents)

- The less engaged Facebook Families segment is more under-represented (7% of the Plymouth-resident audience vs. 14% of the population)

- The three largest Audience Spectrum segments are Experience Seekers, Trips & Treats and Dormitory Dependables (13%)."

When we look at box office data rather than surveys, the profile is slightly closer to that of the Plymouth households[1]. The most notable differences are:

- Commuterland Culturebuffs are over-represented (8% of the audience vs. 4% of the population)
- Dormitory Dependables are over-represented (17% of the audience vs. 10% of the population)
- The less engaged Facebook Families segment is under-represented (10% of the Plymouth-resident audience vs. 15% of the population)
- The three most prominent Audience Spectrum segments amongst Plymouth audiences are Trips & Treats (22%), Dormitory Dependables (10%), and Up Our Street (14%).

Audience Spectrum

Compared to England, Plymouth has larger proportions of Experience Seekers, Trips & Treats and Up Our Street:

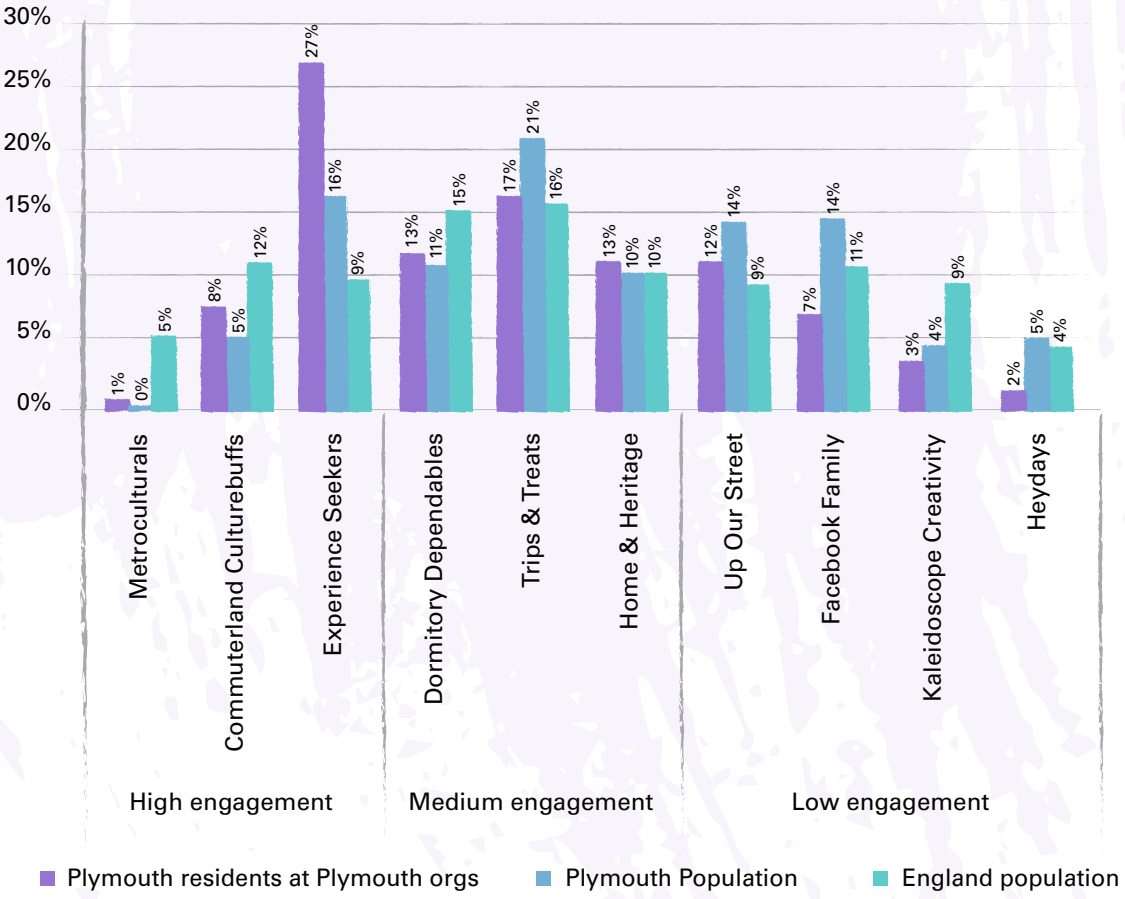
- **Experience Seekers:** Diverse urban audiences, students and recent graduates into a variety of cultural events (Higher engagement segment)
- **Trips & Treats:** Suburban households, often with children, whose cultural activities usually are part of a day out or treat (Medium engagement segment)
- **Up Our Street:** Reasonably comfortably off households, occasional audiences for popular arts & entertainment, museums and heritage sites (Lower engagement segment)

As we would expect, the segments which tend to be more culturally engaged are seen in higher proportions in Plymouth organisations' combined survey data, in particular Experience Seekers. Trips & Treats and Facebook Families are notably under-represented, with the most room for growth.

- **Facebook Families:** Harder pressed suburban and semi-urban households for whom arts and culture plays a small role (Lower engagement segment)

1 We typically compare box office profiles to the profile of all household in an area rather than all residents, so the figures for comparison are slightly different than when looking at survey data.

Survey data (largely museums and galleries)

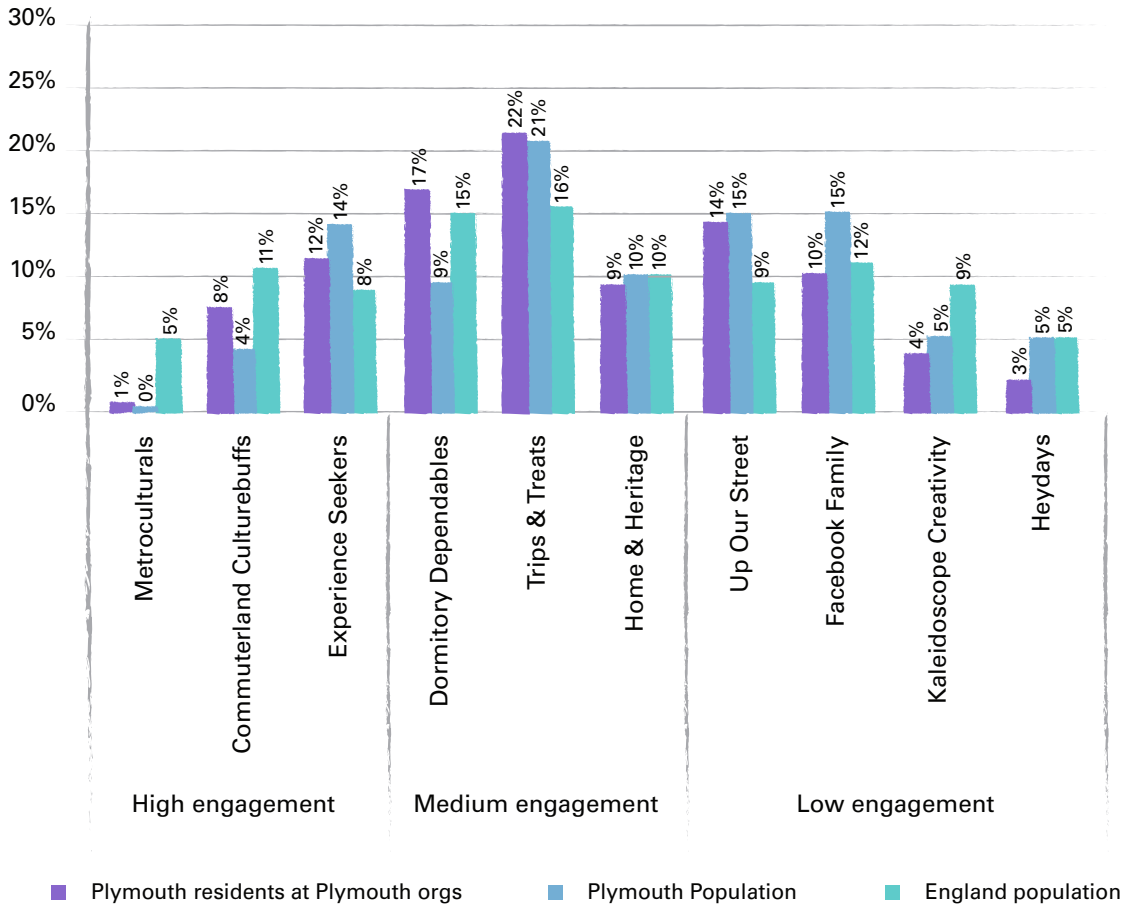


When we look at Audience Finder ticketing data, which tends to focus on paid-for performing arts, we see a similar pattern in terms of an under-representation of the less engaged segments.

However, we see the largest over-representation in the medium engaged Dormitory Dependables segment, and a slight under-representation of Experience Seekers. The most potential for growth exists amongst Facebook Families, Experience Seekers and Heydays.

- **Dormitory Dependables:** Regular but not frequent cultural attenders living in city suburbs and small towns (Medium engagement segment)
- **Heydays:** Older people who find it harder to access the arts and cultural activities that they may use to have enjoyed (Lower engagement)

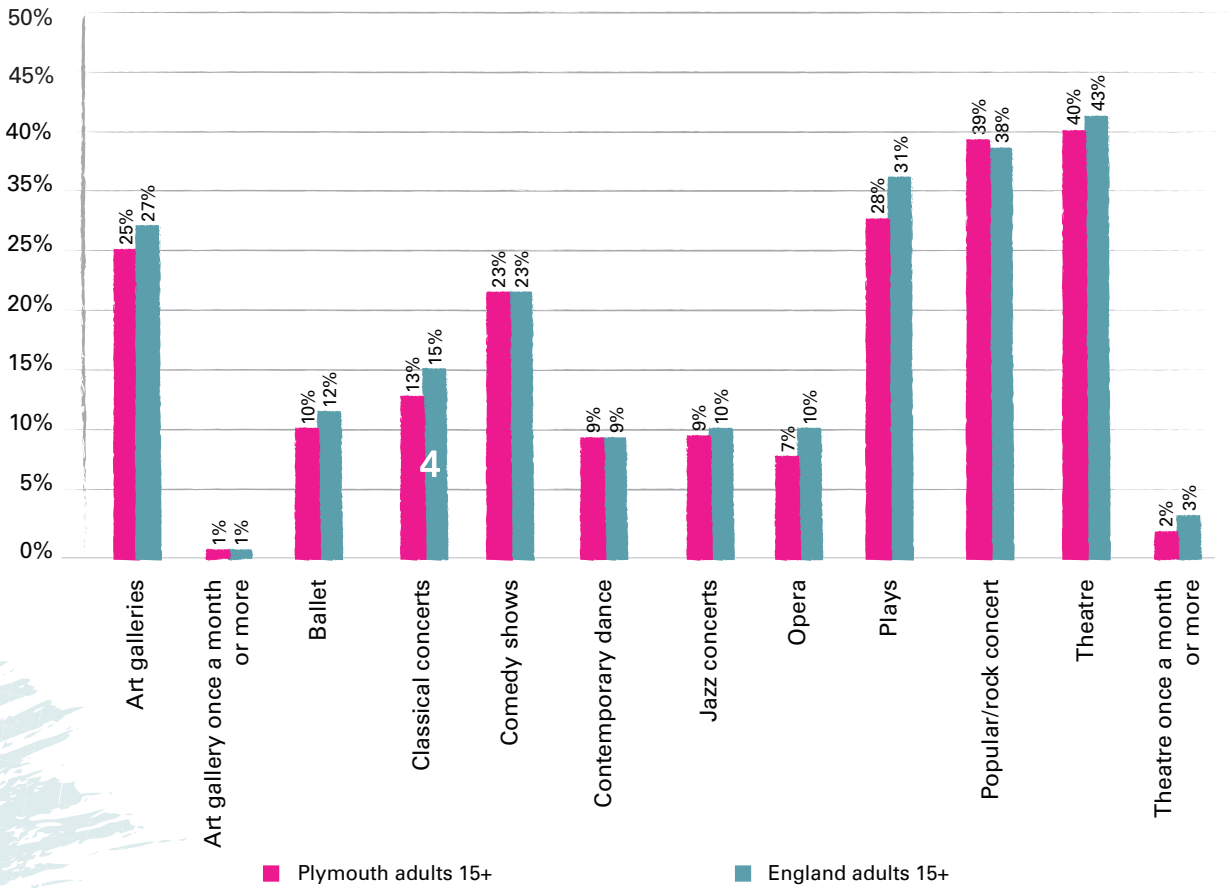
Ticketing data (largely performing arts)



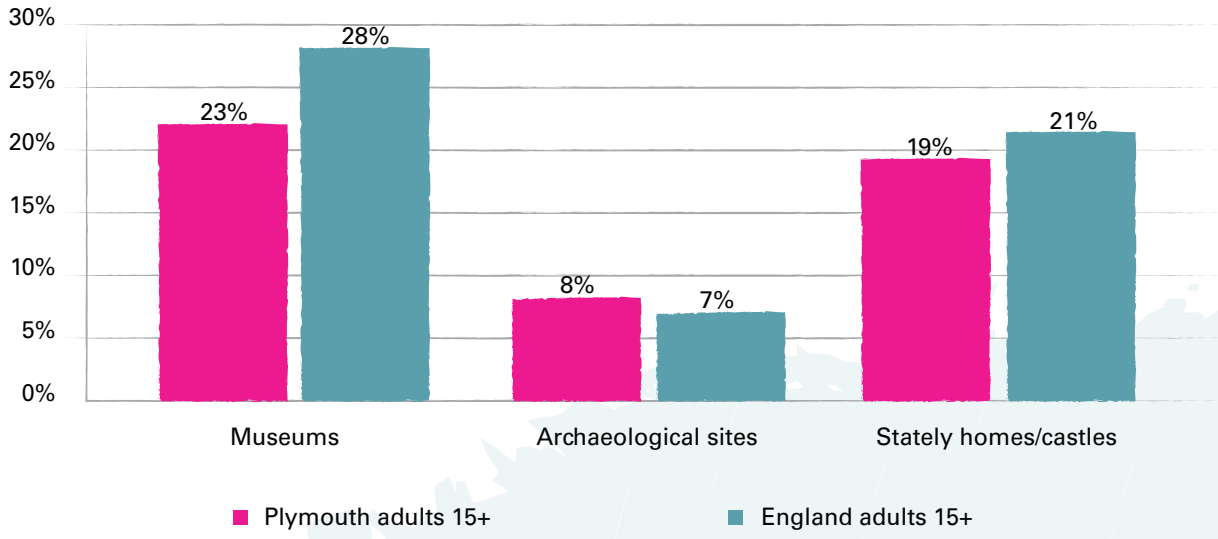
Descriptions of each segment are given in the appendices, and detailed pen portraits are available at www.theaudienceagency.org/audience-spectrum.

Arts and cultural attendance

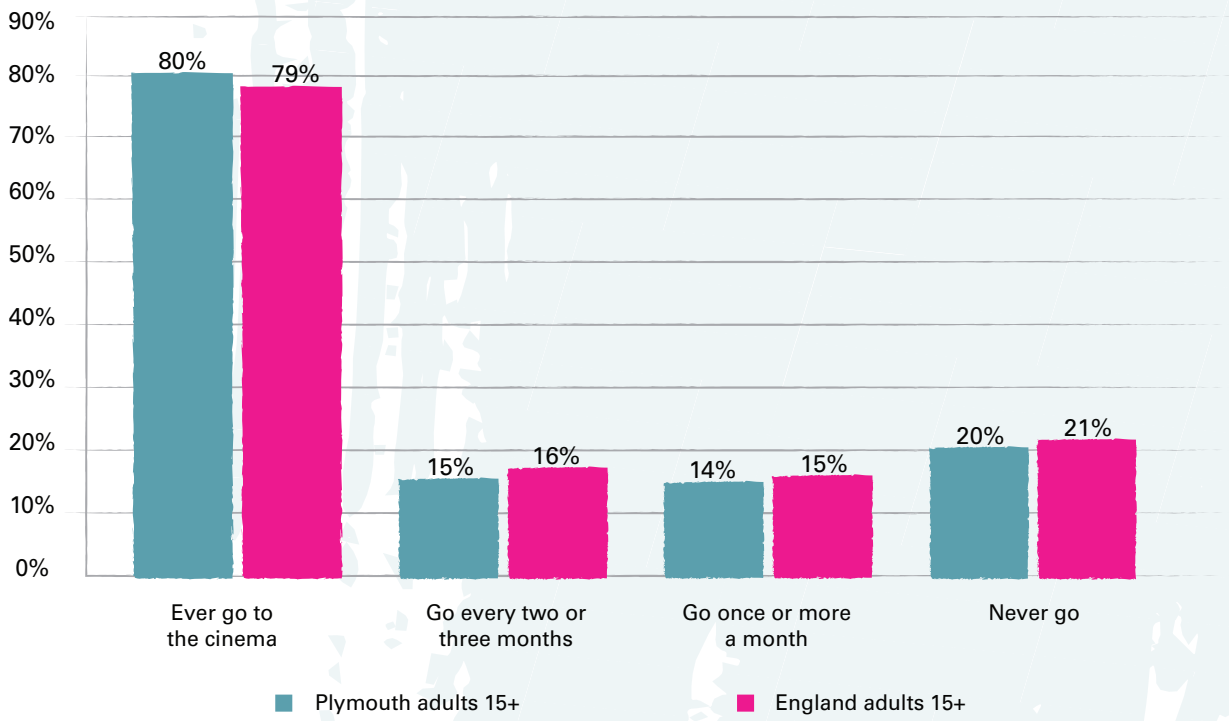
Arts attendance - attended in past 12 months



Museums and heritage attendance - visited in past 12 months



Cinema Visits



The cultural sector

This section looks at the size, makeup and value of the cultural sector in Plymouth. The cultural sector is defined as businesses with SOC codes under the category of "Arts, entertainment, recreation & other services", with data derived from the Inter-Departmental Business Register.

Headlines

- According to the most recent Inter Departmental Business Register data available, 365 business units (i.e. companies or sole traders) classed as "Arts, entertainment, recreation & other services" are based in Plymouth. This accounts for 6% of all enterprises in Plymouth.
- In the South West as a whole, 6% of enterprises are classed as "Arts, entertainment, recreation & other services", similar to England as a whole.
- 10 Plymouth organisations were granted NPO status for 2018-22. This places Plymouth 26th out of all English Local Authorities in terms of NPOs per head of population
- Plymouth NPOs were granted £16m over 2018-22, or around £59 per resident. This places Plymouth 13th out of all English LAs in terms of NPO funding per head.

Employment and GVA

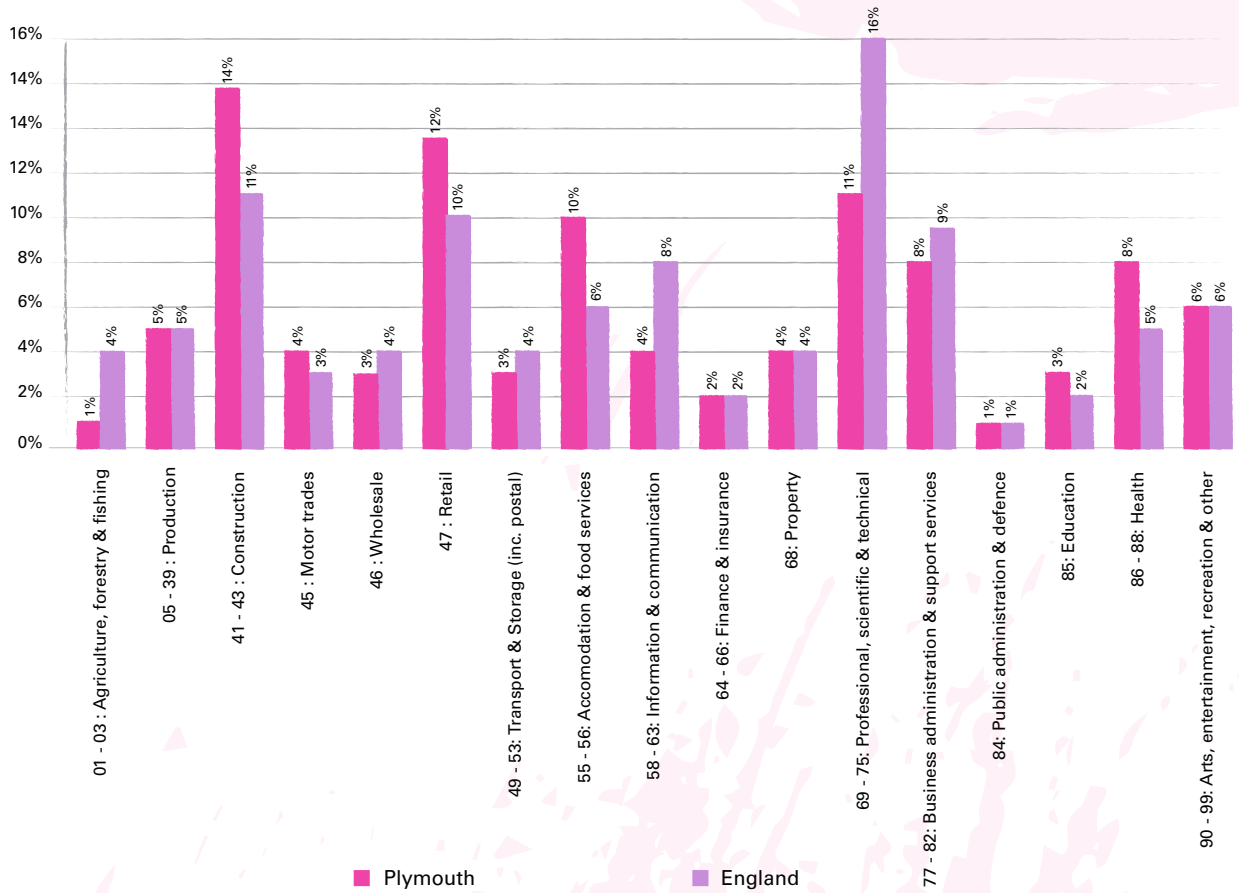
Based on modelling and statistics from Plymouth City Council:

- 1,520 people are employed in the cultural sector in Plymouth. A further 610 jobs are supported by the cultural sector.
- Using Gross Value Added as a model for economic output, the cultural sector accounts for £69.1m economic output per year. When indirect effects are taken into account, this increases to an economic output of £98.8m.
- The productivity of the sector is £69,000 GVA per full time employee, which is higher than the average across all sectors in Plymouth.
- The three largest cultural sector employers in Plymouth employ 29% of the cultural workforce. The largest five employ 39%.
- Cultural sector jobs are concentrated in the St Peter & the Waterfront and Moor View wards, together accounting for just under half of employees.

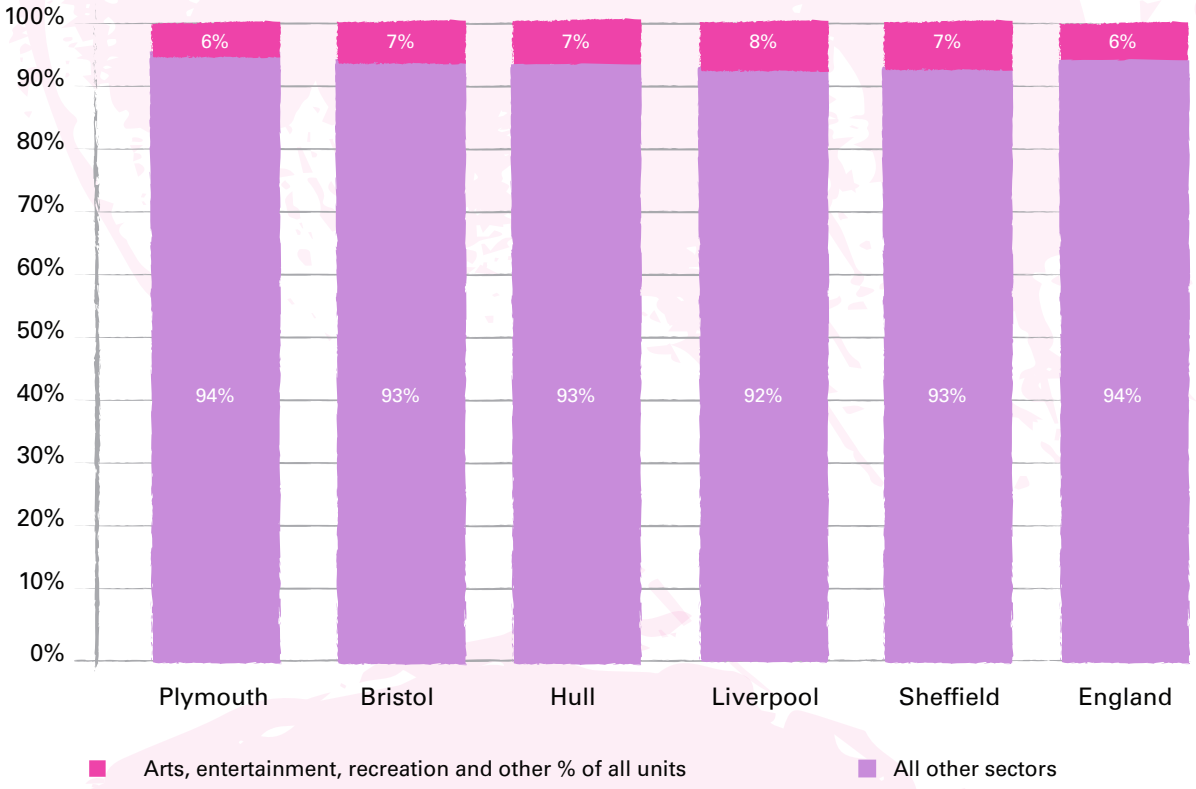
Size of the sector

The following charts are based on ONS data, specifically UK Business: Activity, Size and Location 2019. The cultural sector in this context is defined as all business units with SOC codes beginning 90-99. Some organisations which we might consider to be part of the sector may have different SOC codes, and therefore fall into one of the other categories.

Number of VAT and / or PAYE based local units, all sectors



Number of VAT and / or PAYE based local units, Culture by city

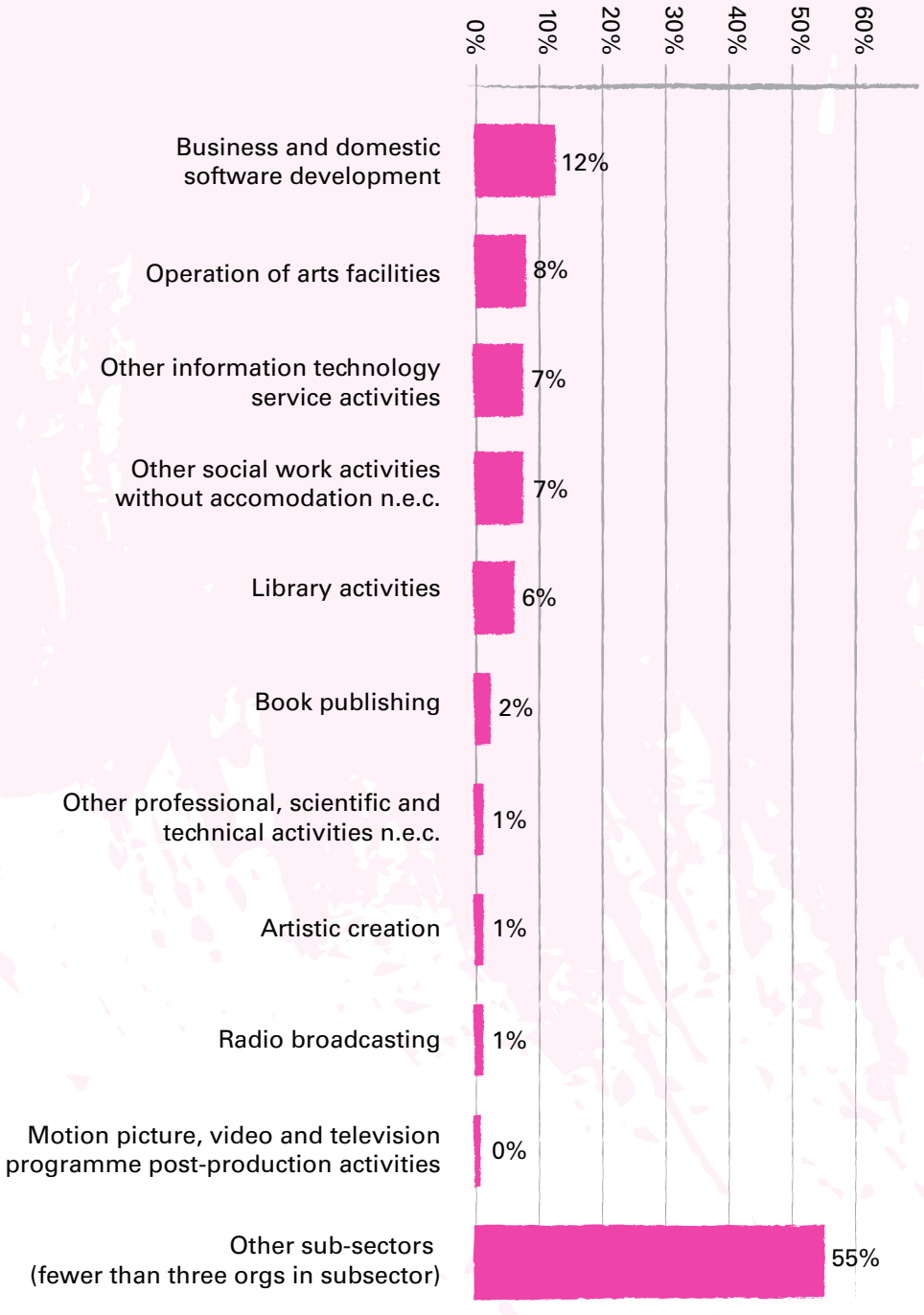


Employment and GVA

Key figures

The following key figures were provided by Plymouth City Council, based on analysis of the Inter-Departmental Business Register.

- **1,520 people** are employed in the cultural sector in Plymouth.
- A **further 610 jobs** are supported by the cultural sector.
- Using Gross Value Added as a model for economic output, the cultural sector accounts for **£69.1m economic output per year**.
- When indirect effect are taken into account, the Plymouth cultural sector has a yearly economic output of **£98.8m**.
- The productivity of the sector is **£69,000 GVA per full time employee** - higher than the average across all sectors in Plymouth.

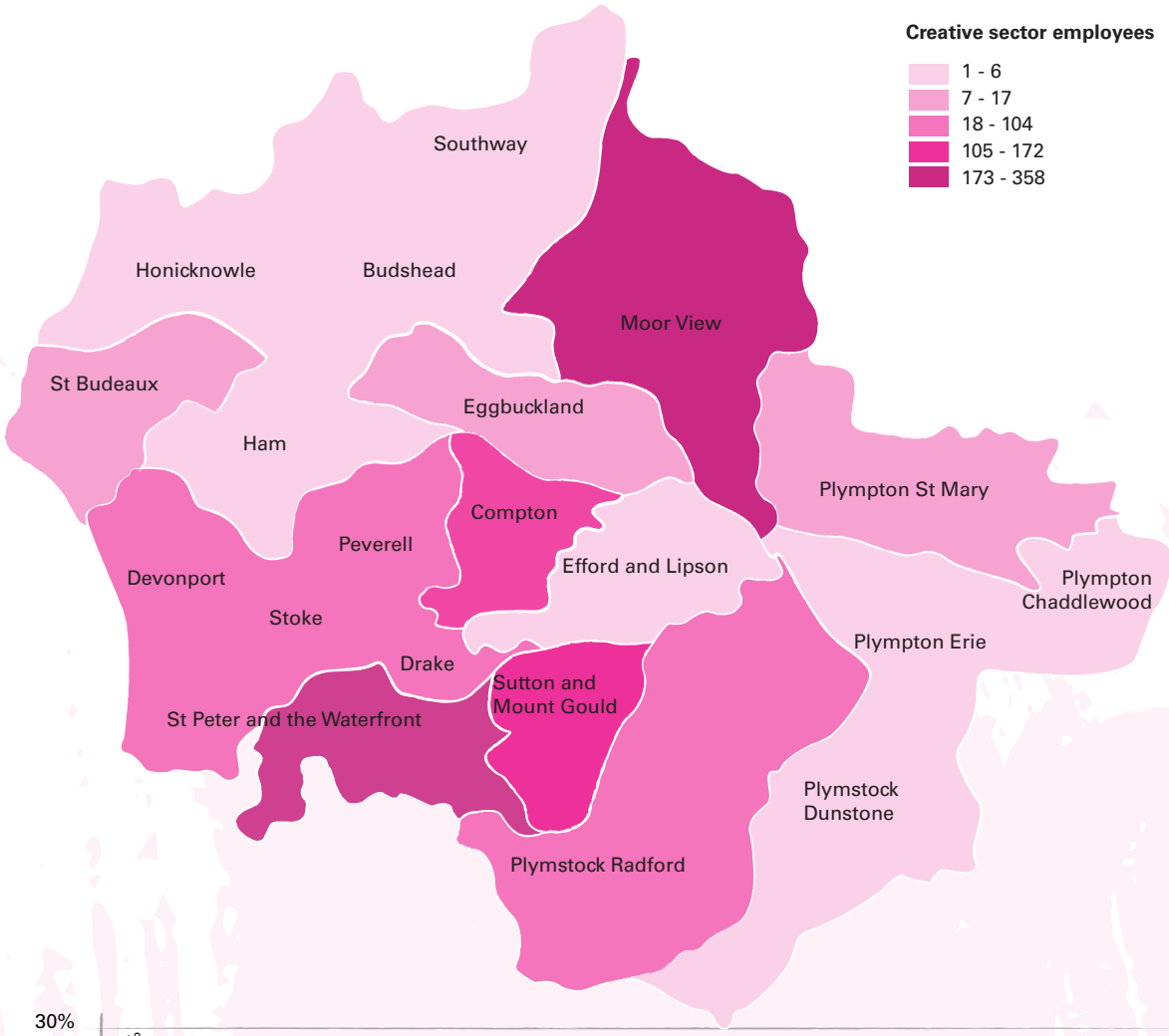


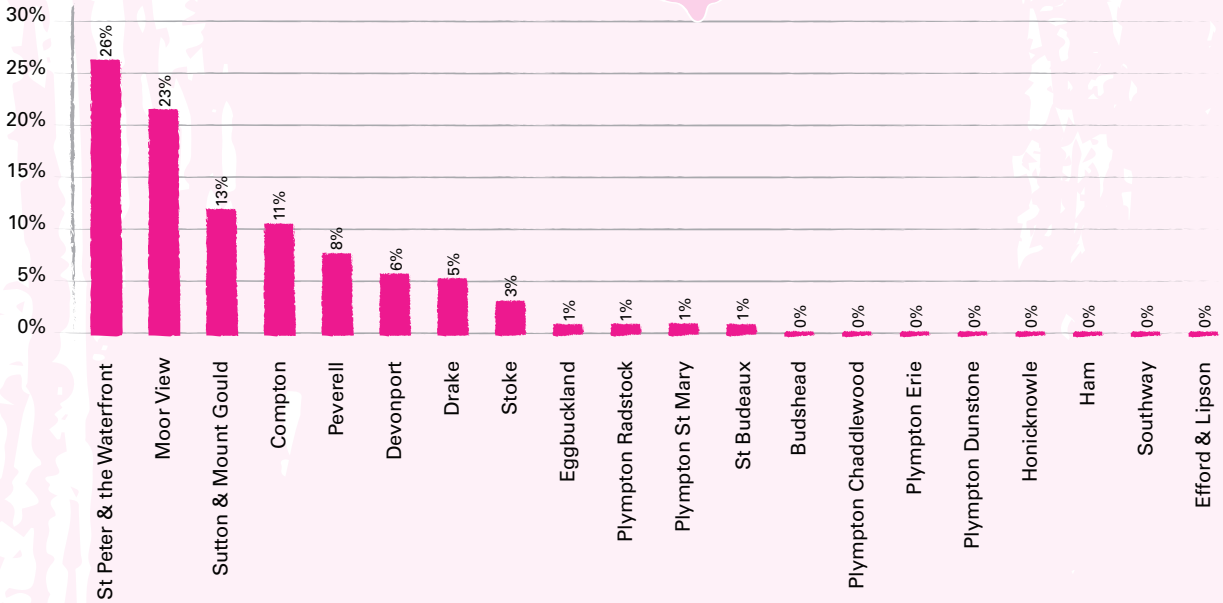
Employment by sub-sector

Plymouth has a diverse range of cultural businesses, with most sub-sectors having fewer than three organisations. Plymouth City Council were able to supply employment figures for the subsectors which had three or more organisations, the largest of these being software development, arts facilities, other IT services, and other 'social work activities without accommodation'.

Employment in cultural sector by Ward

Around half of those employed by Plymouth cultural sector businesses are employed in St Peter & the Waterfront (26%) or Moor View (23%). Businesses in most other wards account for 1% or fewer of all cultural employees.







CULTURE PLAN
SOCIAL IMPACT REPORT

PRODUCED
2020/21

A place-based Culture Strategy

Introduction

There is a wealth of social impact being created by arts and cultural organisations in Plymouth. For some, it is the essence of their work, for others an additional, important thread. All the organisations consulted are clear that the people of Plymouth are central to their practice, and specific about the communities they work with and hope to benefit.

The intended beneficiaries are varied and range from practitioners to participants, and the reason for their engagement ranges from purely geographical to communities and individuals with particular needs or interests. Nudge Builders, for example, are intent on working with and supporting their immediate area, and are run by local residents for their fellows, while Visual Arts Plymouth supports and facilitates artists' development in a variety of ways and at various levels.

In this study, we have interviewed people with pivotal roles in the provider organisations and made contact where we could with people who have engaged and benefitted in some way from the activities and support provided. Organisations have also provided data, reports, and comments from their users.

Key findings

All areas of the city are covered by at least four organisations, though it is hard to map where an organisation gives a catch-all 'we cover the whole city' response. It is also clear that the majority of organisations have quickly picked up the threads of their core activities and are already tailoring them effectively to the impact of the pandemic.

Those organisations who can produce and/or deliver collections material or education packs both online and to people's doors are those who have the best chance of engaging. Where there is special need for contact, or a lack of online access, some organisations are making regular phone calls to known individuals. From groups to individuals, beneficiaries roughly fall into the following categories:

- Age ranges (older people, young people, care home residents, veterans' associations)
- Families (young, new, intergenerational)
- Practitioners (artists and performers, producers, emerging)
- Specific geographic areas of need (identified through index of social deprivation, for example)
- People with specific mental health needs
- People from communities of asylum-seekers and refugees

The focus has been on change – the outcomes intended to create impact and the longer term change that these aim to bring about. The personal stories create probably the most convincing narratives of improved health, new skills, improved confidence and getting work, for example, and offer information on the depth of engagement that can be of benefit to the wider policy environment. There is also a sense that all activities are core to organisations' beliefs, there is no sense that any of the projects are opportunistic in any way. The Box express this physically, even, with their learning centre showcase.

One organisation spoke of a very supportive local MP, while they felt that the local councillors had very little knowledge of what they do. Others had good relationships with and some support from their council and councillors.

The thread of the need to raise awareness of activity came through strongly in most of the interviews and is perhaps an area that Plymouth Culture as an organisation may be able to help address.

The map following shows where the social impact work is concentrated, by how many organisations. It is not possible to show the presence of organisations whose response was 'the whole of Plymouth'.

Number of organisations interviewed who are focusing in each postal sector



Organisation Responses

1. Barbican Theatre

- Beneficiary target groups: young people, care home residents and staff, isolated individuals and communities, creative practitioners.
- Areas covered: working in PL7, throughout the city
- Number of beneficiaries: over 33,000 engagements during the covid period
- Partnerships: wide variety of cultural organisations

The Barbican are working on social change initiatives in areas increasingly far apart e.g. PL7 and that region. During lockdown, the Barbican worked on Digital Rebels, taking the model to get funding for an online creative group of young people; Singing in the Rain addressed anxiety about being outdoors; they rehearsed outside in parks, then performed at care homes. The aims were to engender confidence in social situations as well as impact on the isolated.

Barbican masterclasses are free for anyone: dealing with topics from tax returns to fundraising, reaching the wider community of artists in the city; a speedway project is planned for May – for members of the community who wouldn't normally go to events.

2. Beyond Face

- Beneficiary target groups: Black, Asian and ethnically diverse artists, young people and communities
- Areas covered: PL1, Devonport (PL1 5), Lipson (student area, PL4 8), Stoke Damerel Community College (PL3 4).
- Numbers: tbc
- Partnerships: Barbican Theatre

Beyond Face is a performance company based in Plymouth whose mission is to raise the profile and visibility of Black, Asian and ethnically diverse artists, young people and communities, 'letting everyone be seen'. In Plymouth, they have a youth company at the University, and the Beyond Ensemble.

They aim to provide a safe space for non-white young people and a stepping-stone for young artists, telling contemporary stories, and are the only black-led cultural organisation in the area.

3. The Box

- Beneficiary target groups: the older, the isolated, the lonely; people with dementia and their carers; the women's craft collective; older women; the lonely, isolated, bereaved; people with mental health issues; intergenerational work for older people and those in dementia wards, in care or residential settings, carers; work involving schools and young people; hospital patients and staff.
- Areas: across the city [see organisation's Google map in appendix C]
- Number of beneficiaries: The Box on The Box series 1 (June-July) had 1,600 views delivered weekly, Series 2 has been delivered fortnightly and has had over 1,000 views.
- Partnerships: schools, community centres, care homes

While the Box was closed for capital redevelopment (from 2016 - 2020), they ran a Museum on Tour programme with two aims - to continue to connect with communities and to raise their profile, reaching across the city.

They work with a range of different communities and one of their priorities is to create work that has meaning for a community, is created by them, so that The Box are supporting not dictating.

4. Fotonow

- Beneficiary target groups: individuals, families, Barne Barton community, schools
- Areas covered: Barne Barton, St Budeaux, PL5
- Numbers: The project created 180 hours employment. 1 bursary student worked on the project for 76 hours and was given £4000 grant. 19 Volunteers gave over 300 hours of time, 7 individuals were from Barne Barton. 20 people attended history walks. 35 people attended Scrapbooks of Barne Barton exhibition. 12 Year Six children from Riverside Primary worked on a media project for six weeks. 45 People attended Plymouth Art Weekender exhibitions. Over 500 people saw work at local community and consultation events. 65% of project participants come from Barne Barton (have a PL5 postcode). Over 10,000 have engaged with the work via social media. Leveraged £16000 additional funding
- Partnerships: Plymouth History Festival, Tamar View Community Resource Centre, Riverside Primary School, Plymouth Art Weekender.

Fotonow have 11 years of socially engaged work in Plymouth and the wider SW region. The organisation's main objective is using media as a force for social change

As a social enterprise they have been measuring their impact and developing frameworks and developed the ambition to spend more time with fewer communities. Since August 2017 they have delivered an extensive heritage project exploring the community of Barne Barton, The Island Stories - see www.theislandstories.co.uk

5. Literature Works

- Beneficiary target groups: creative writing undergraduates at the University, emerging writers, reminiscence workers
- Areas covered: across Plymouth, including the University
- Partnerships: Moments Café; University of Plymouth

Literature Works has South West coverage, but three elements of their current plan are particularly relevant to Plymouth: reviving the Plymouth Literature Festival; National Memorial Day – poetry and reminiscence including a free half day training for local poets.

in how to work with people with dementia who are still living in the community, going to memory cafes - for them and their carers; and the appointment of the Plymouth young city laureate, which is now changed to appointing an adult laureate.

The artform is now moving toward recovery writing ('outsider' writing) using it not as therapy but as a journey, and with resilient women – supporting writing groups for survivors or ex-offenders.

6. Nudge Builders

- Beneficiary target groups: residents; young people; emerging entrepreneurs, SMEs
- Areas covered: PL1 and across the region
- Numbers: In three years Nudge have:
- Unlocked 25% of the land in their neighbourhood that has derelict and empty buildings on it.
- Created 6 full time jobs (5 are people who live within 1 mile).
- Spent 96% of their income in Plymouth and 53% within 1 mile.
- Supported 87 people to develop projects and businesses in Stonehouse.
- Hosted 51 interventions and improvements on the street.
- Worked with 286 organisations and people to host 1479 events attracting 54,000 people.
- Created a free wifi area along the street used more than 2,000 times in 6 months.
- Supported 112 people during Covid-19 Lockdown with shopping, regular calls and pharmacy pick ups.
- Repurposed 75 digital devices with Borrow Don't Buy for local families that had no suitable devices at home for schoolwork or keeping connected.
- Nudge Builders aim to spend 70% of money raised within a mile, 90% within Plymouth
- Partnerships: city council services; Union Street residents

Nudge have just taken on their third, very large, building – The Plot (relating to allotments). They are bringing back empty spaces along Union Street for lasting community benefit. Like allotments, people take on a 'patch' or 'shed' – they monitor how who comes in will collaborate locally and relate to others in the space.

The instigators both live locally; twelve years ago they joined the local residents' group and started a street party to create joy, rather than to meet need. They started to question why all the buildings were empty and thought if someone is to take them over, why not us?

Empty buildings lead to anti-social behaviour and this was known as a 'no go' area – public services were coming in dealing with urgent need, but not making any difference. They found ways to encourage lasting change for people.

7. Plymouth Dance

- Beneficiary target groups include: mainly over 50 (75-80%); cross-generational family members e.g. grandparents and grandchildren; carers' groups for respite; Veterans' associations; Tickets for Troops contacts; dance students, graduates and professional dance practitioners [see case studies in appendix C]

- Areas: invitational for anyone in the city of Plymouth

- Number of beneficiaries: from 2016-19 held 30 events at Guildhall, with over 100 per event – 1,000+ register once or more than once

- Partnerships: Plymouth Creative Education partnership; Plymouth and Devon Race Equality Council and the Respect! Festival; The Box, Plymouth University and City College Plymouth

Plymouth Dance major on best practice in participation-led and co-creation work. They concentrate on three areas:

- The professional development of dancers in the city – 45% of whom get 100% of their income through dance

- People in colleges/unis, freelancers or who work at Barbican

- Co-design and co-creation of dance projects 'that no-one else is doing' Their major project currently is the Tea Dances with a Twist!

8. Plymouth Music Zone

- Beneficiary target groups: older people, general, stroke survivors, care home staff, young people with Parkinsons, children with complex disabilities, special schools, early years' nurseries, Plymbridge secure unit, Mount Wise primary school

- Areas: 30-40% activity in Devonport; across the city – Sutton (PL2), Mount Gould (PL4), Stoke (PL3), St Paul's, Efford (PL3), Runnymede (PL6), Plympton (PL7)

- Number of beneficiaries: 20-25 weekly at hospital; 4000 plus for various wellbeing interventions including for isolation issue

- Partnerships: City counselling services; rural area partnerships; Plymouth City Council

With a mission to increase wellbeing, reduce loneliness and isolation and help people make friends, recover from illness and manage disabilities or mental health issues, PMZ work with a range of organisations and communities in Plymouth and elsewhere.

An evaluation report by BOP Consulting showed the work of Plymouth Music Zone has a significant impact on both individual and community development within the city, using the power of music to tackle loneliness and isolation by reaching out to some of the most vulnerable and marginalised people in the community.

9. Real Ideas (RIO)

- Beneficiaries: disadvantaged groups in city and rural areas, with a focus on young people, businesses and artists
- Areas covered: throughout Plymouth
- Across all events, beneficiaries range from one to 50,000 people; e.g. 1600 young people supported since 2014; 50 artists; 75 social enterprises
- Partnerships: Artsmark; Kickstart; local businesses

A social enterprise, all of whose projects aim to have social impact. They have contracts to work with groups for vulnerable young people and with schools – giving young people access to activities they couldn't otherwise participate in. They consider themselves not to be an 'arts organisation' but 'an organisation that creates social change'.

10. Street Factory

- Beneficiary target groups: see video link for examples (https://youtu.be/GZ0emPJ65Vs)
- Areas covered: PL1 (Stonehouse)
- Number of beneficiaries: Free Saturday sessions have up to 100 families in the room – grandparents to grandchildren; 70 pupils attend special needs school sessions weekly; 80 participants weekly at outreach and fitness classes; 30 mentoring sessions a week; 100 plus performances annually
- Partnerships: include Citybus, local councillors, livewell, public health, PCC, Schools, universities, Plymouth community homes, Santander, local businesses, City centre team, Hotels, Art College, Fire service and Police

Street Factory is in the most deprived area in the county. It is run as a teach-to-teach process – 'when you feel better, bring others in' – which creates a ripple effect. People always join on personal recommendation. All sessions are now online for free; the Creative Change programme continues on Facetime – during the last lockdown 'we were on the phone all the time to people'.

They learn whatever the community needs, try to create integrated groups – so that people realise they can communicate with anyone – a great confidence booster.

11. Take A Part

- Beneficiary target groups: Individual case studies in impact report e.g. first person in family to go into higher education, volunteering; schools; practitioners
- Areas covered: Efford, Coxside, North Prospect, across Plymouth
- Number of beneficiaries: Worked with over 330,000 people in the city of Plymouth; commissioned over 47 artists to work on more than 30 commissions, 40% of artists employed are local to Plymouth: 8 communities across the city of Plymouth; 15 schools; created 3 social enterprises; held 30 community exhibitions
- Partnerships: Efford community, PCC, Plymouth community homes. local schools, other agencies e.g. Health, Barnardos

Take A Part have an organic approach to community-working, starting from a pilot programme with the Efford area of Plymouth and developed into a city-wide organisation and then onto a National Portfolio Organisation with regional and national reach.

The work focuses on communities of geography that are high on the socio-economic deprivation register and experiencing stressors associated with that: Lack of opportunities for employment and training, poorer than average health, lack of local services and infrastructure and the need for increased inclusion and connectivity.

12. Theatre Royal Plymouth (TRP)

- Beneficiary target groups: young people; communities; adults with complex needs; refugee and asylum-seeker children
- Areas covered: throughout the city
- Number of beneficiaries:
- Over 17,000 people engaged last year in learning and outreach work
- Annual festival has 2,000-3,500 attenders
- With Flying Colours' target is 2,000 children over three years
- This Land: 100 Plymouth people involved before Covid put this on hold
- Project with children from a refugee and asylum context that has continued for 10 years; 10-12 children work intensively.
- Our Space has worked with over 700 people and 44 referral partners. (See Funky Lama and Our Space infographics in appendix B for more detail)
- Partnerships: In 2018 it became a social prescription under the Wolseley Trust, working with 28 primary care services in Plymouth; most city services; With Flying Colours; Mayflower 400

In 'normal' times, all their engagement and learning work has social impact and reaches huge numbers. It addresses wellbeing, people enjoy participating. TRP have a youth theatre, a people's company (citizens), a choir (mainly aged over 25), schools' work, one-off activities for young people, and more traditional work with communities.

Our Space, running for 11 years now, is unusual in outreach in sustaining something over that length of time – it's for adults with multiple and complex needs. They have managed to sustain the work during lockdown; where people find it hard to zoom they send out care packages, postcards, phone people… They are also behind 'With Flying Colours' - one of the five partners in this youth performance partnership attracting £1 million in funding – TRP wrote the application with the Barbican.

13. Visual Arts Plymouth

- Beneficiary target groups: includes artists and emerging artists [see case studies in appendix C]
- Areas covered: mainly Union Street, PL1
- Number of beneficiaries: [see evaluation report in appendix C]
- Partnerships: Nudge Builders, Theatre Royal Plymouth, Arts Institute and Karst, in addition to Plymouth HE institutions and The Box

Visual Arts Plymouth creates a platform for which other people provide the actual work - more indirect than direct impact. They work in areas of Plymouth where people may fall into disadvantaged category and make every effort to be inclusive, siting work as much around the city as possible. Work is delivered through project funds plus central funding for the directors to create a Covid response and survival strategy. They support a key number of emerging artists through commissions and resources and advice on how to mount events. The steering group is a mix of institution representatives and freelance individual artists – this involvement naturally skills people up e.g. all three directors began as activators.

14. The Wheel

- Beneficiary target groups: young people and adults from disadvantaged areas
- Areas covered: across the city
- Objectives: opportunities to train in stagecraft for young people from less prosperous backgrounds
- Number of beneficiaries: [the organisations is not yet fully established]
- Partnerships: TRP, Barbican

A production and training company, offering schools and college workshops and the Wheel Actor Training Company; a Theatre Royal Plymouth associate. They offer training workshops for young people both 16 plus and 18 plus – aimed at people who can't access other available training.

They reach out to communities that don't necessarily feel there are opportunities offered to them – in disadvantaged/deprived areas and from BAME backgrounds, offering outreach work also – identifying/meeting/encouraging people to come in, working up to them getting the strength to go to auditions and offering work to put on CVs that is as real as possible.

15. WonderZoo

- Beneficiary target groups: disabled performers and audiences, people identifying as BAME, LGBTQ+ performers and attenders, residents in disadvantaged areas, asylum seekers and refugees
- Areas covered: North Stonehouse area, Union Street
- Number of beneficiaries: Performance work in Union Street offered 10 performers a session, which equals approximately 20 people a month. Zoom meetings bring 30-plus attenders.
- Partnerships: Nudge Builders, Respect! Festival, Pride, Plymouth and Devon Equality Council; Plymouth Culture and Education Partnership

WonderZoo are a Plymouth-based arts collective who major on spoken word, with performance events, workshops, cross-artform activities and a radical reading group. Social inclusion is at the root of all their activities.

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Date of meeting:	08 December 2021
Title of Report:	**Climate Emergency Action Plan 2022**
Lead Member:	Councillor Maddi Bridgeman, Cabinet Member for Environment and Street Scene
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Paul Barnard, Service Director for Strategic Planning & Infrastructure
Contact Email:	Paul.Barnard@Plymouth.gov.uk
Your Reference:	CEAP2022
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The proposed Climate Emergency Action Plan 2022 is submitted for consideration by the Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee ahead of the City Council meeting to be held on 24 January 2022, in accordance with the commitment made by the Cabinet Member for Environment and Street Scene at its meeting on 15 January 2020 (Minute 40 refers).

The report introduces the Climate Emergency Action Plan for 2022 and the planned specific actions to address climate change issues during 2022. The Climate Emergency Action Plan sets out the strategic direction for the City Council and its partners in relation to climate change for Plymouth. It is a demonstration of the City Council's commitment to lead the city towards net zero carbon by 2030.

The Climate Emergency Action Plan 2022 is a dynamic, living document that is prepared annually. The Plan maintains the five key areas for action established by the first plan to ensure that it is fit for purpose as actions are ramped up through the three strategic phases of the journey to zero carbon emissions by 2030.

Initially, the response to the climate emergency required quick and decisive action to reverse the on-going increases in carbon emissions. This period of activity is identified as the "emergency response phase". There are two further stages in our journey towards net zero carbon. The "transitional phase" will focus on the delivery of more substantial carbon reduction projects, a reshaping of policy and a realignment of resources to meet the 2030 net zero carbon challenge. The final phase, known as the "acceleration phase", will drive a significant shift towards net-zero-carbon living, working and travelling, ramping up still further decarbonisation actions and initiatives.

The Climate Emergency Action Plan 2022 is intended to be the last of the current "emergency phase". It outlines over 114 realistic, achievable and deliverable actions the City Council is committed to delivering during 2022 in order to make tangible progress in this period of urgent response. Detailed case studies provided by partners in the Plymouth Net Zero Partnership have been included in this third Climate Emergency Action Plan to illustrate the growing momentum behind climate emergency work across Plymouth.

Recommendations and Reasons

It is recommended that the Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee:

1. Support and endorse the Climate Emergency Action Plan 2022, noting that the Climate Emergency Investment Fund has yet to be funded or established.

Reason: To set the direction of travel for the decarbonisation of Plymouth, encourage the submission of funding bids to deliver the commitments set out in the plan, facilitate stakeholder engagement for further revisions to the plan in accordance with the decisions of the City Council on 18 March 2019 to declare a climate emergency (Minute 89 refers) and to prepare annual actions plans through to 2030, as first agreed on 16 December 2019 (Minute 7 refers).

Alternative options considered and rejected

Option 1 – Prepare a single plan covering the 11 years of the Climate Emergency – This was rejected as it would soon be out of date and not fit for purpose. Nor would it be sufficiently flexible and able to respond quickly to new science and new funding and other opportunities.

Option 2 – Do not prepare any Climate Emergency action plans – This was rejected as it would not be consistent with the decision of the City Council on 18 March 2019 to declare a Climate Emergency.

Relevance to the Corporate Plan and/or the Plymouth Plan

The actions being proposed in this report are consistent with the themes and values of the Corporate Plan 2021-2025 and as well as those of the Plymouth Plan.

On 16 December 2019, the City Council resolved to undertake an early review of the Plymouth Plan with city partners in order to ensure that the Plymouth Plan reflected the ambitious targets set out in the City Council's Declaration of a Climate Emergency. The outcomes of this review of the Plymouth Plan were adopted by the City Council on 25 January 2021.

The 2014-2034 Plymouth Plan's commitment to tackling environmental issues was strengthened in the version adopted by the City Council in January 2021. Climate Change issues are embedded, including references in the "Growing City" theme showing that the plan is attempting to balance growth creation with the need to reduce carbon emissions. A policy devoted to climate change, Policy GRO7 'Reducing carbon emissions and adapting to climate change', sets out a range of measures to deliver significant reductions in carbon emissions in Plymouth, aiming to achieve net-zero by 2030.

Implications for the Medium Term Financial Plan and Resource Implications:

The actions set out in the Climate Emergency Action Plan 2022 are already funded either through the use of existing budgets or external funding.

The CEAP 2022 has 114 action; 13 of which are led and funded by our partners in the Net Zero Partnership. Out of the 101 action that are PCC-led, 46 are funded by exiting departmental budgets, 37 by grants that have already been secured, with an additional 7 awaiting outcome of a funding opportunity. 11 actions require funding from the Climate Emergency Investment Fund. The creation of this fund is recommended in this document.

The scale of the challenge to reduce emission across the city to net zero carbon by 2030 is not underestimated. Following on from COP 26, and as we are approaching the "transition phase", the Climate Emergency Action Plan will require further revenue and capital resources. Budgets will need to be reassessed and capacity released to enable effective delivery of the necessary decarbonisation actions which will inevitably have to be ramped up each year through to 2030.

Financial Risks:

As outlined in implications for Medium Term Financial Plan and Resource Implications section.

Carbon Footprint (Environmental) Implications:

As previously reported, climate science is clear that the eventual extent of global warming is broadly proportional to the total amount of carbon dioxide that human activities add to the atmosphere. In order to stabilise climate change, CO2 emissions need to fall to zero and emissions of other greenhouse gases also need to be curtailed.

Alongside the Corporate Carbon Reduction Plan 2022, the Climate Emergency Action Plan 2022 will ensure Plymouth is playing its part in reducing its carbon emissions. It has set itself the challenging target of meeting net zero carbon by 2030, in advance of the 2050 target of national government.

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 report recommits the City Council to promote a fairer, more equal Plymouth by investing in communities, putting citizens at the heart of decision making, promoting independence and reducing health and social inequality. By embedding this commitment in the Plymouth Plan the City Council is acknowledging the importance of ensuring all communities have an opportunity to thrive in a zero carbon world.

Appendices

**Add rows as required to box below*

Ref.	Title of Appendix	**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 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
		1	**2**	**3**	**4**	**5**	**6**	**7**
CEAP 2022	DRAFT Climate Emergency Action Plan 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 <u>unpublished</u> 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 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
	1	**2**	**3**	**4**	**5**	**6**	**7**

Sign off:

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Originating Senior Leadership Team member: Paul Barnard, Service Director for Strategic Planning & Infrastructure

Please confirm the Strategic Director(s) has agreed the report? Yes
Date agreed: 23/11/2021

Cabinet Member approval: *Councillor Maddi Bridgeman, Cabinet Member for Environment and Street Scene, via One-to-One Portfolio Holder meeting.*
Date approved: 23/11/2020

PLYMOUTH CLIMATE EMERGENCY ACTION PLAN 2022

Next Steps Towards Net Zero in 2030

Plan 3 of 11
January 2022

OFFICIAL: SENSITIVE

I have great pleasure in introducing the third Climate Emergency Action Plan in response to our declaration of a climate emergency in March 2019.

I am determined that we focus on actions and not words. We have put in place measurable actions which will move us towards our ambition for net zero by 2030. With the impact of the pandemic and the funding constraints we are having to work within, we are nevertheless determined to achieve meaningful results on the ground.

We know we can't respond to the climate challenge on our own as a City Council. We will continue to work with partners, with local people and communities and with the government to do as much as we can. We also want to share good practice working with other local authorities. We know all too well that a failure to act will be a failure of leadership and will be catastrophic for our planet. We also know the cost of not acting now will put an even greater financial burden on future generations if we do nothing.

I am therefore determined that Plymouth will be on the right side of history when it comes to action on climate change and therefore look forward to continuing to work with the Plymouth Net Zero Partnership on a range of actions and initiatives to decarbonise key sectors.



Maddi Bridgeman
Cabinet Member for Environment and Street Scene, Plymouth City Council



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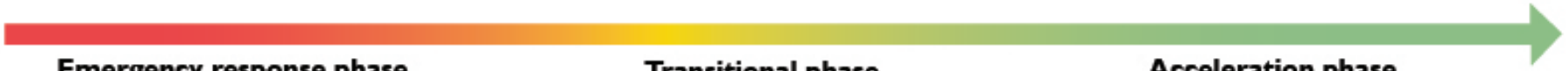


CLIMATE EMERGENCY ACTION PLAN STRATEGIC APPROACH

Climate emergency purpose
Facilitate city-wide conversation
Inspire rapid local action
Create bottom up pressure on government

Climate emergency values
A city approach that supports national and global change
Everyone plays their part
No one gets left behind

Journey towards net zero carbon



Emergency response phase 2019-21	Transitional phase 2021-23	Acceleration phase 2023-30
Emergency response phase focus Continuation of work that is effective at reducing carbon emissions. Inspire local action by focusing on projects that are quick to initiate and deliver proven carbon reduction outcomes. Analyse and assess where information, resources and policy changes are needed to support the move towards zero carbon, and initiate lobbying to secure the powers and resources needed. City collectively sets out vision for how Plymouth will function in a zero carbon world.	**Transitional phase focus** Ramping up delivery of projects that deliver significant carbon reduction, including building retrofits, new low carbon energy generation and changes to mobility infrastructure. Complete full scenario testing of options for achieving zero carbon. Identifying and prioritising actions. Embedding new ways of working. Continuing to lobby government for powers and resources to enable us to meet our aim. City collectively moves towards zero carbon living with everyone playing their part.	**Acceleration phase focus** All actions required to enable us to reach our zero carbon target are identified and are being implemented. All new projects and developments in Plymouth are being delivered in a manner that will ensure that they are zero carbon by 2030. Zero carbon working practices are fully embedded as business as usual. Plymouth is thriving, with a zero carbon focused approach to growth and quality of life.

FOCUS

The following sections provide an overview of actions that will be implemented by the Council in 2022 to tackle the climate emergency. Once again, the focus is very much on credible and deliverable activities within those sectors that are responsible for the majority of emissions.

- BUILDINGS
- MOBILITY
- POWER AND HEAT
- WASTE
- ENGAGEMENT AND RESPONSIBILTY





BUILDINGS

Along with transport, the city's buildings continue to be the greatest producer of emissions - and though the trend for emissions is a slight reduction, there is huge way to go to reach net zero.

The Government continue to stress this with the release of several funding streams aimed at retrofitting both domestic and public sector buildings. The Council has been successful in obtaining funds from these, though significant additional funding is vital in order to achieve the scale of retrofits required in the city to meet the 2030 target.

BUILDINGS Actions

The buildings sector provides an opportunity for local action to make a real impact on carbon emissions. The range of actions that can help achieve this is vast, as are the co-benefits that come with retrofitting – including benefits to the local economy and employment market, improved living conditions and health and wellbeing, reduction in energy cost and fuel poverty. The scope of building actions in this year's plan is wide ranging and covers policy, new build, retrofit and engagement – all of which are essential if we are to provide a robust response to the decarbonisation of buildings.

3.1 Commence delivery of Phase 3 of the Green Homes Programme by improving the energy efficiency of over 150 homes by 2023.

3.2 The University of Plymouth will continue to work towards net zero emissions (scope 1 and 2) by 2025 and deliver fuel and power conversion to renewables through onsite photovoltaic and heat pump installations.

3.3 The University of Plymouth will continue to deliver energy reduction projects (and work towards reducing mains grid electricity use by 20% and mains gas by 25% as a minimum by 2030 from 2005/06 levels) including: remaining LED lighting conversion projects; smart building management system upgrades for advanced controls; transformer replacements; big data project, using data driven analytics to reduce energy use.

3.4 University Hospital Plymouth will work towards reducing the Trust's carbon footprint by 20% by 2025 and reaching Net Zero Carbon by 2030.

3.5 University Hospital Plymouth will work towards achieving a 10% net biodiversity gain by 2025.

3.6 Plymouth Marjon to complete the roll out of ground source heat pumps in 44 of their student accommodation units and education buildings, saving 600 tonnes of CO_2 per year when up and running in March 2022.

3.7 Commission a biodiversity report in order to set targets and measure improvements to biodiversity on the Plymouth Marjon Campus.

3.8 Secure planning permission for a flagship Energiesprong low carbon housing development on land at Kings Tamerton and commence on-site infrastructure works.



3.9 Identify further housing sites in the city which could deliver exemplar low and zero carbon housing as part of the Eco Homes Programme.

3.10 Work with the University Sustainable Earth Institute to develop a guide for developers highlighting the benefits of green walls and roofs in new housing developments and seek to ensure these are provided for in future housing schemes.

3.11 Engage with Western Power to establish existing grid capacity and understand the impact of new development. Explore smart approaches that would reduce the impact of new developments on the electricity grid.

3.12 Work with the Plymouth Net Zero Partnership to investigate innovations in decarbonising buildings.

3.13 Working with Plymouth Energy Community, Plymouth Community Homes and Live West, investigate opportunities to deliver EnergieSprong household retrofits in partnership with Homes England.

3.14 Work closely with UK Green Building Council (UKGBC), review and where relevant join its low carbon campaigns and low carbon learning opportunities.

3.15 Lobby government to provide funding support to registered providers, house builders and developers in areas of comparably lower house values like Plymouth, to meet the additional development costs of achieving net zero housing.

3.16 Work with Local Authority Building Control to interrogate the detail of Future Homes Standards and Future Buildings Standards once they are published and lobby government for improvements where standards are considered not ambitious enough to meet the 2030 net zero commitment.

3.17 Provide advice (with Plymouth Energy Community to in excess of 200 landlords from the private rented sector on how they can improve the energy rating of their properties.



3.18 Work with social housing providers to apply for funding from the Social Housing Decarbonisation Fund, to lower the carbon emissions, reduce fuel bills and improve the comfort and health of over 100 households in the city.

3.19 Implement an accessible web-based home assessment tool working with Plymouth Energy Community to help residents establish their eligibility for funding of energy saving upgrades by 2022.

3.20 Provide a digital resource for households to provide information on the viability of heat pumps retrofits for a range of typical housing types in Plymouth by 2022.

3.21 Continue the delivery of surface water drainage improvements in Central Park to reduce the risk of flooding in Central Park and Central Park Avenue.

3.22 Commence delivery of surface water storage and Landscape Masterplanning in Trefusis Park to better protect properties in Lipson Vale and Bernice Terrace and improve park amenity and ecological value.

3.23 Commence work to extend tidal flood defences at Arnold's Point along the Embankment up to the rail bridge.

3.24 Commence the delivery of improvements to protect the causeway, public footpath and tidal creek ecology at Ernesettle Creek.



CASE STUDY

Community-led low carbon homes

Plymouth Energy Community (PEC) has partnered with Plymouth City Council for its first community-led housing project, which is a scheme of up to 70 affordable net zero homes on council-owned land in Kings Tamerton. By creating genuinely affordable, healthy homes in the heart of Plymouth, our community can be part of the solution to tackle fuel poverty and climate change. To achieve its aim, PEC set up PEC Homes and intends to use an innovative approach to the procurement, design, build and monitoring of these high-performance homes. This is referred to as the Energiesprong approach. The Kings Tamerton site would be the first Energiesprong new build scheme in the country.

What is 'Energiesprong'?

Energiesprong (Dutch for 'Energy Leap') isn't a commercial product or brand. It is an approach to housing that guarantees homes will be warm and affordable to heat and power. These net zero energy homes will produce as much renewable energy as they consume over the course of a year, making the most of every opportunity to generate renewable power, and also to use it efficiently. The energy efficiency of the properties will result in lower fuel costs for residents. The project at Kings Tamerton is going through the planning process and can be reviewed on the Council's planning page.





CASE STUDY

Construction begins on innovative CobBauge research building

The University of Plymouth is also using its estate to further research, with construction underway of the first building in the country to be made from an upgraded version of the centuries-old material of cob.

The single-storey building will act as a classroom and laboratory with researchers monitoring the performance of the new walling material, as well as demonstrating it to future building designers, contractors, housing associations and interested stakeholders.

With planning permission secured, construction of the 32-square-metre building, located next door to the University's Sustainability Hub, began in August 2021. It is expected to take around eight months to complete, with the work being carried out by Paul Barclay and Chris Noakes (Eco-Construction) and the University's Estates team.

Further information and pictures can be found at https://www.plymouth.ac.uk/news/construction-begins-on-innovative-cobbauge-research-building

UNIVERSITY OF PLYMOUTH

CASE STUDY

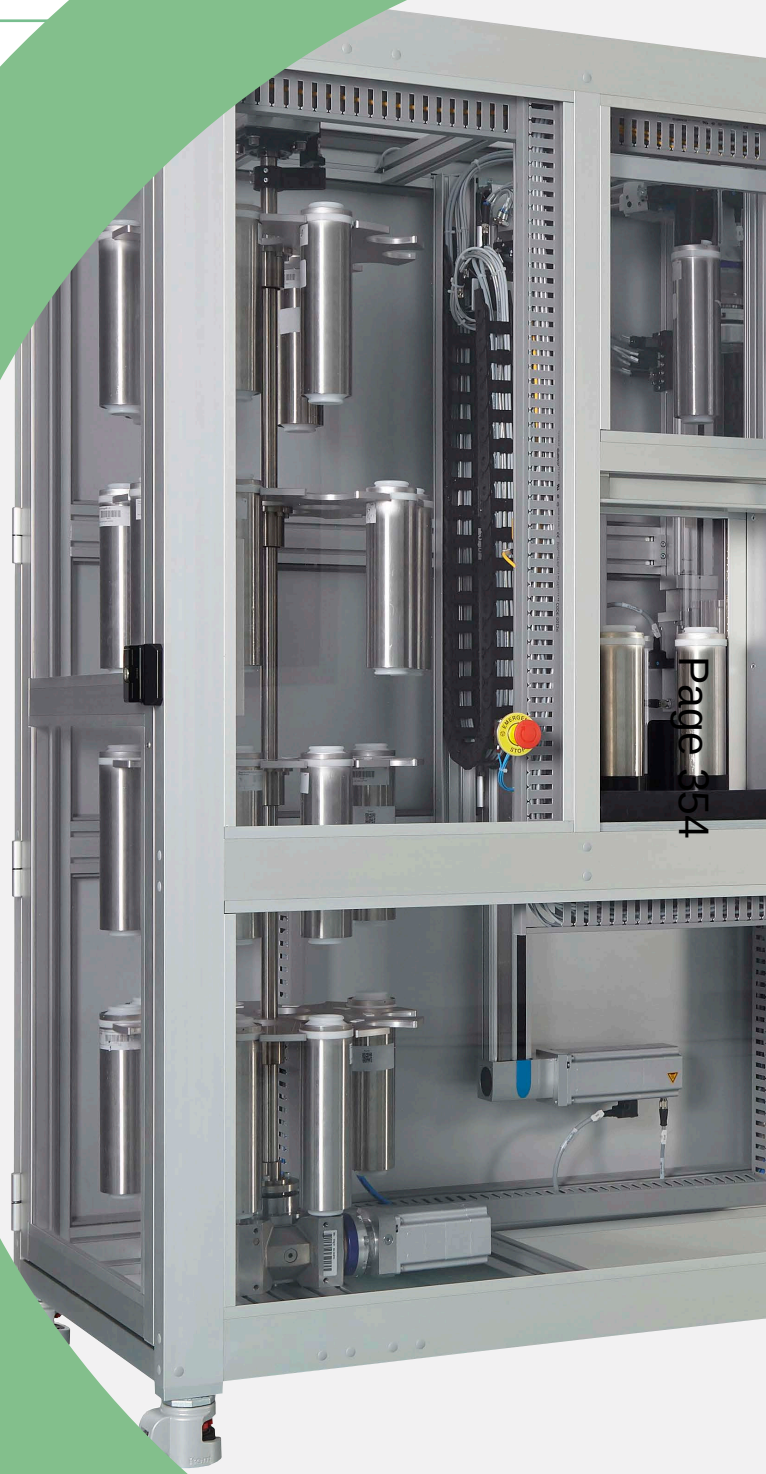
Reduction in anaesthetic gas carbon emissions at Derriford Hospital

University Hospitals Plymouth NHS Trust (UHP) is working with SageTech Medical (based in Devon) to undertake a pilot study in our theatres to capture, extract and purify exhaled waste anaesthetic gases. Capturing these gases, as opposed to venting directly into the atmosphere, significantly reduces their environmental impact and has the potential to minimise the clinical impacts of global warming and improve theatre efficiency. In 2018, the annual release of anaesthetics gases were equivalent to 1,109 tonnes of CO_2e. It is estimated that we could prevent 70% of this release through the use of this new technology e.g. 776 tonnes of CO_2e.

This innovation is a global first. SageTech have developed an extraction machine to remove the captured gases and collect them as a liquid, which will then be separated and purified. The 18-month purification process has been agreed by the Medicines and Healthcare product Regulatory Agency (MHRA) in theory and in laboratory scale demonstration. This pilot is part of a process agreed with the MHRA to ensure that the recycled products are safe for reuse.

The trial in theatres is due to commence in the Autumn/Winter 2021.

NHS
University Hospitals Plymouth
NHS Trust





CASE STUDY

Marjon Zero

Marjon Zero is an exciting visionary project to make Marjon University one of the greenest in the country and to do our bit to protect the planet. We are committed to zero carbon by 2030.

Phase one of Marjon Zero is already complete. We installed approximately 2,000 solar panels saving 300 tonnes of carbon per year (tonnes CO_2e). In phase one we also switched our lighting to energy efficient LEDs and installed five electric vehicle charging stations.

Phase two of Marjon Zero is underway. We now are installing 120 bore holes as part of our ground source heat pumps project which will save 617 tonnes of carbon per year (tonnes CO_2e).

This project is ground-breaking, with Marjon being the first University to implement a ground source heat pump project of this size, meaning Marjon, its community and the surrounding areas are at the forefront of new sustainability initiatives in the race to net-zero carbon. The project is enabled by grants from the Public Sector Decarbonisation Scheme, to the value of £1.8m for solar panels and £3.5m for ground source heat pumps. In future phases of the Marjon Zero project, we will go on to retrofit current buildings and make our campus a greener space by expanding our green social spaces and the biodiversity around campus.

PLYMOUTH MARJON UNIVERSITY

CASE STUDY

Low carbon development at University of Plymouth

The University of Plymouth is currently in the construction phase of two major projects: the creation of an iconic new engineering and design facility on its main campus; and the redevelopment and refurbishment of the former Intercity House, at Plymouth Railway Station, to create Intercity Place, a new centre for students in the Faculty of Health. Both are examples of ultra-low carbon design that reuse the existing concrete frame to reduce waste and generation of embodied carbon. Both are also set to include enhanced building controls to ensure efficiency in operation of heating and ventilation and other building services, as well as renewable technology and a focus on sustainable material use.

The buildings are being converted to electric heating and cooling, powered by a renewable electricity tariff and onsite photovoltaics, decarbonising energy in use. For the new engineering and design facility, this will see the first building on campus to be disconnected from the University's gas-fed Combined Heat and Power (CHP) heat network, providing the catalyst to start the conversion of this network to an electrically-powered, low-temperature, ambient loop system. The buildings are expected to be completed by summer 2023.



UNIVERSITY OF PLYMOUTH

MOBILITY

The transport sector is accountable for 30% of the city's total emissions and is an area which requires a major change in public behaviour if we are to achieve our 2030 target.

There is a requirement to rapidly increase the rate at which emissions are reduced based on current trends. Electric vehicles and charging points hold the key to the transformation of mobility.

Net zero essentially requires all cars and vans driving in Plymouth to be electric and the provision of the corresponding charging infrastructure. At the end of 2021, there were 283 electric vehicles registered in Plymouth. Reducing emissions from larger commercial vehicles and HGVs also needs to be considered.

The need to accelerate the rate of reduction from transport emissions is well reflected by the scale and scope of actions included in this year's plan. Increasing the sustainable travel options available for the city is a thread which links all the following mobility actions. Supported by the Transforming Cities Fund, 2022 will continue to see design and installation work commence on several key sites in the city. These improvements will be made alongside expanding the charging infrastructure for electric vehicles in the city, and removing barriers to allow people to walk and cycle.

3.25 Complete the Southway to Plymbridge walking and cycling scheme.

3.26 Complete the continuation of the off-road Eastern Corridor walking and cycling route to Colesdown Hill.

3.27 Complete construction of the Derriford Community Park cycle paths.

3.28 Commence the delivery of the Coronation Avenue Scheme to promote walking and cycling within Central Park.

3.29 Continue work on the Dockyard to City and St Budeaux to Docks cycle schemes.

3.30 Continue development of St Budeaux Station's Sustainable Transport Interchange.

3.31 Commence delivery of the Woolwell to the George Transport Improvement Scheme, which will deliver an extension to segregated walking and cycling facilities along Plymouth's Northern Corridor.

3.32 Continue development of transport improvements along Royal Parade to enhance sustainable transport in the city centre and commence construction of preferred design.

3.33 Continue development of transport improvements on Mayflower Street that will create more space for waiting passengers and arriving buses using both Royal Parade and Mayflower Street and commence construction of preferred design.

3.34 Commence construction of the St Budeaux to Crownhill sustainable transport corridor.



3.35 Commence construction of the Transforming Cities flagship Mobility Hubs, which will offer a low carbon multi-modal network for travel throughout Plymouth.

3.36 Continue development of the Plymouth Station access project to promote low-carbon forms of transport and facilitate pedestrian access between the station, the university and the city centre.

3.37 Continue to roll out the Healthy Streets Assessments of selected city centre streets to promote better integration of public health, transport and planning in the design of streets to make them more people focussed.

3.38 Complete the Old Town Street/New George Street public realm scheme, creating high quality walking and cycling routes through the city centre to facilitate a higher proportion of journeys by sustainable modes.

3.39 Commence construction of the Civic Square public realm scheme, creating high quality walking and cycling routes through the city centre.

3.40 Complete design work on the Armada Way public realm scheme, creating more opportunities for walking and cycling routes through the city centre.

3.41 Continue to expand the Local Cycling and Walking Implementation Plan by another 5 routes.

3.42 Undertake a car free day to support residents to walk, cycle and use public transport, rather than the car, for regular journeys they make.

3.43 Continue to support up to 30 local businesses to develop facilities for active travel through Workplace Travel Grants.

3.44 Continue to bid for Department for Transport funds to deliver active travel schemes.

3.45 Deliver tranche 3 of the Active Travel Fund to provide additional high quality walking and cycling facilities at up 10 locations in the city, delivering improved pedestrian and cycle crossings and routes.



3.46 Deliver a feasibility study on how the Plymouth Health Sector can link to the Council's wider walking and cycling programmes through a social prescription programme.

3.47 Secure Mini Holland project funding in order to deliver a feasibility study considering how Plymouth Communities can be designed to facilitate greater levels of walking and cycling and less reliance on the private car.

3.48 In response to the National Bus Strategy, develop a Bus Service Improvement Plan and form an Enhanced Partnership with public transport providers to include targets to substantially increase public transport patronage and bus reliability.

3.49 As part of the Bus Service Improvement Plan, give consideration to the role of existing Park & Ride facilities as a means of encouraging mode switch to public transport for part of the journey.

3.50 Complete the development of Morlaix Drive to provide better bus access to Derriford Hospital, improving service reliability.

3.51 Submit the Bus Service Improvement Plan which will include a bid for a share of Government funding set aside for the purchase by local bus operators of zero emission buses, including the purchase of electric mini buses to support Access Plymouth demand responsive services.

3.52 Continue to input into the Decarbonising Strategy of Peninsula Transport which will require an assessment of scenarios for transitioning to low carbon and Net- Zero mobility futures, including a phased plan outlining the steps required to achieve transition either through reducing miles travelled by motorised vehicles or reducing carbon emitted per mile travelled.

3.53 In partnership with Network Rail discuss the feasibility for investing in creating more opportunities for rail freight delivery to and from the city.

3.54 Contribute to the Peninsula Transport Regional Rail and Freight Strategy, to develop a plan for more efficient distribution of goods across the region.

3.55 Engage with taxi drivers to understand the barriers to the adoption of electric vehicles and develop a programme of support and promotion.



3.56 Deliver further charging infrastructure for electric powered boats.

3.57 Lobby government to consider fiscal incentives to support home and flexible working for businesses in the city.

3.58 Lobby government to increase the proportion of Department of Transport capital funding delegated to local authorities.

3.59 Lobby government to review vehicle exercise duty in order to encourage a switch to sustainable transport modes.

3.60 Review the government's Transport Decarbonisation Plan and identify opportunities in Plymouth for future climate emergency initiatives and actions.

3.61 Continue to liaise with the Plymouth Cycling Campaign to ensure the experiences for cyclists in the city are improved.

3.62 Publish an Electric Vehicle Chargers Inclusion and Accessibility Design Guide to raise the standard and consistency of facilities in the city.

3.63 Work with the Plymouth Net Zero Partnership to investigate innovations in fleet technologies.

3.64 Work with the University of Exeter and the University of Plymouth Sustainable Earth Institute to identify opportunities for research into clean transport technology.



CASE STUDY

Devon & Cornwall Police

On 15 March 2021 our Chief Constable, Shaun Sawyer, launched Devon & Cornwall Police's vision of 'World Class Sustainable Policing', which is underpinned by three key principles, one of which is a commitment to the UN Sustainability Goals.

To realise our vision, and in support of the UK Government's commitment to make the G7 Summit a carbon neutral event, we commissioned the Centre for Energy and the Environment (CEE) at the University of Exeter to estimate the greenhouse gas emissions that may arise from policing the event, which were then mitigated through Gold Standard offsets purchased by the Cabinet Office.

We are also piloting electric police vehicles at our Exeter Police station and are currently developing our force's sustainability strategy and decarbonisation plan, which we hope to launch soon. We are committed to creating a legacy we can be proud of.

Devon & Cornwall POLICE





CASE STUDY

EXOcell, Plymouth City Bus

Plymouth City Bus are trialling technology known as an EXOcell developed by Atmos-Clear Limited © on 5 vehicles, with the aim of reducing the production of toxic emissions from engines.

The system works by adding hydrolysed gas to the regular fuel/air mixture. The result is a faster, cooler fuel burn which eliminates almost all waste gases produced. Different cell sizes can be used for various vehicles, all the way from those with small engines to larger commercial vehicles.

This technology will enable us to reduce the emissions of our current diesel and petrol vehicles immediately whilst we prepare for a switch to affordable and effective alternative fuels and vehicles when they become available.

CASE STUDY

Cycling in Plymouth

Active travel is good for you and good for the planet. Not only will it boost your mental and physical health, if you replace car journeys it will reduce your greenhouse gas emissions. Road transport is responsible for over a quarter (28%) of Plymouth's total greenhouse gas emissions. Switching to active travel modes, even for some of our journeys, is one of the most immediate and accessible ways to address this.

In order to make cycling an accessible, attractive and safe option for all, Plymouth City Council and its partners are making improvements to the network of walking and cycling routes linking Plymouth's neighbourhoods.

We are constantly working to secure funding that will enable us to make improvements to our active travel network. In 2020, we delivered the following schemes:

- Southway Drive
- Stoke Damerel College to Ponsonby Road
- Broxton Drive to Saltram Meadow





Southway Drive

People that are not confident to cycle with general traffic are now able to avoid the road, after a length of footway along Southway Drive and Southway Lane was widened and resurfaced to provide a traffic-free route. A number of crossings for pedestrians and cyclists at side roads were also improved, and tactile paving added to help improve safety for people with visual impairments. Two well used paths connecting Plymbridge Road with Miller Way were also widened and resurfaced.

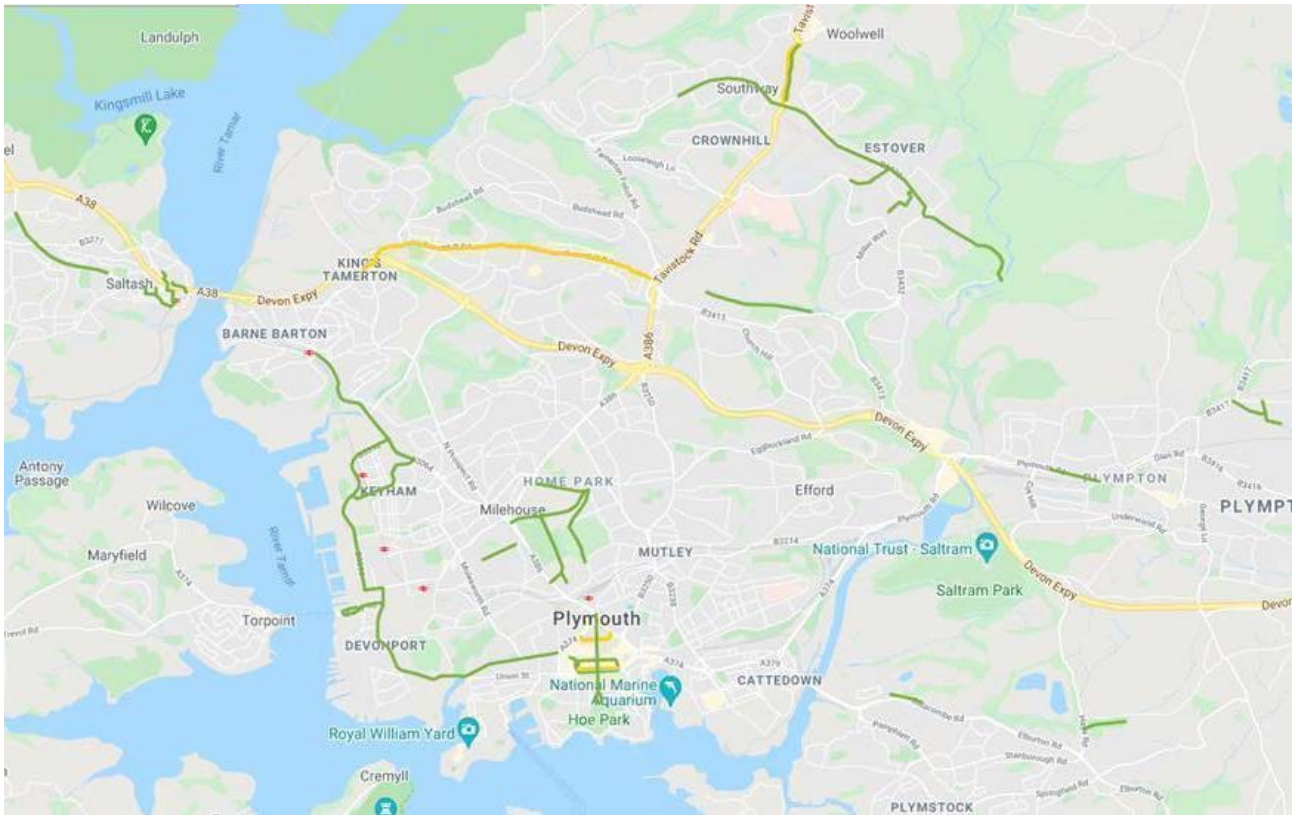
Stoke Damerel College to Ponsonby Road

We improved the path running between Somerset Place and Ponsonby Road in Milehouse. New lighting was installed and the path was realigned, resurfaced and widened to make the route far safer and more attractive to walk and cycle to Central Park and the Life Centre from Stoke and the surrounding area. Since the works were completed usage of the path has increased by 124%.[1]

Broxton Drive to Saltram Meadow

The Broxton Drive to Saltram Meadow scheme continues the high quality, traffic-free walking and cycling route alongside Billacombe road. This brand-new route for pedestrians, cyclists, wheelchair and mobility scooter users, was completed in June 2021. A second phase of this scheme, ensuring a safe and attractive continuation of the route on Colesdown Hill, is planned to begin in 2022. The longer term proposal is to extend the path further east to Colesdown Hill and beyond to link in with Elburton Road and the Sherford development; so providing a safe, and healthy, travel alternative and reducing congestion and air pollution on the A379 and elsewhere.

1 Between 2013 and 2020 survey data.



As a Council we're committed to walking and cycling and further improvements are planned. The map below shows the cycle routes (in green) that either have been, or are, being delivered through the Transforming Cities Fund programme by 2023.

However, our walking and cycling programme goes beyond the provision of new infrastructure. Alongside the investment in new routes we're also giving people the skills and experience they need to get out and about on foot and by bike in Plymouth through our Plymotion programme.

Plymotion offers adult cycle training, led rides, bike maintenance courses, along with personalised travel advice. Qualified instructors can even cycle with people on routes individuals would like to try – all for free.

Between 2017 and 2020, through the programme:

- 1,270 hours of free adult cycle training were provided
- 1,781 people participated in led cycle rides
- 17 customers received adaptive bike training
- 47 bike maintenance workshops were held
- 144 people were trained in bicycle maintenance
- 29 cargo bike loans took place

This programme is having an impact and Department for Transport figures show that cycling has doubled in the past decade in Plymouth. Please visit www.plymouth.gov.uk/plymotion to find out more and start your active travel journey.



POWER AND HEAT

Power and heat includes emissions resulting from electricity usage and emissions resulting from providing heat to buildings.

Nationally, emissions from power generation have continued to fall as the percentage of renewable energy contributing to the national grid increases. Last year renewable energy (including biogas) provided 43% of the power the UK consumed.

Local solutions to decarbonise heat are crucial if we are to meet our 2030 target. The following heat and power actions are a reflection of this, highlighting areas that are already at an advanced stage, as well as more innovative solutions that require further development. Successful funding applications will enable a low carbon heat network to commence, whilst our partnership work with Western Power will ensure grid capacity to keep our buildings warm.

3.65 Progress proposals to connect Civic Centre to the city centre low carbon heat network.

3.66 Assess the feasibility of marine source heat pumps at various sites around Plymouth.

3.67 Assess the feasibility of heat networks in Barne Barton and Derriford.

3.68 Test the yield from ground source wells in Millbay to provide low carbon heat.

3.69 Secure planning permission for a Community Solar Farm at Chelson Meadow in partnership with Plymouth Energy Community (PEC), with a view to deliver a 13.2MW array.

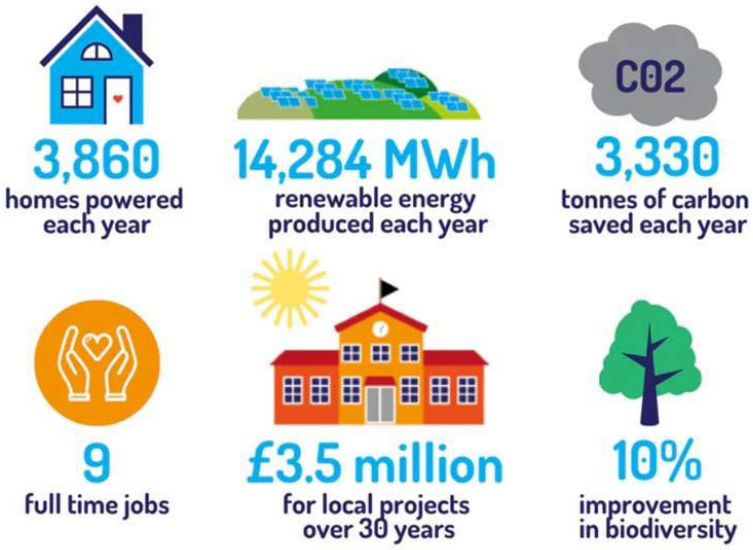


CASE STUDY

Chelson Meadow solar farm

Plymouth Energy Community (PEC) is working with Plymouth City Council to develop a solar farm. The solar project will be located on the old landfill site at Chelson Meadow. The site will be the size of 24 football pitches, three times bigger than the 4MW Ernesettle solar farm, owned by PEC. With support from a government grant, PEC have now completed feasibility studies that show the project could generate enough renewable electricity to power 3,860 homes, save 3,330 tonnes of carbon each year and provide a 10% improvement in biodiversity.

The project will maximise the local economic benefits of the investment and ensure any surpluses are invested into other local projects that respond to climate change.







WASTE

The Climate Change Committee's Sixth Carbon budget suggests that 80% of the UK's CO_2 reduction in the waste sector to 2035 should be achieved through waste prevention, increased recycling and banning biodegradable waste from landfill.

This will require a huge increase in recycling rates across the city, as well as large scale behaviour change.

The Environment Act 2021 has the potential to have a big impact on how local authorities deal with waste. That said, carbon emissions resulting from waste are still some of the most difficult to calculate, and subsequently some of the most difficult to mitigate through action. The basic principle of Reduce, Re-use, Recycle within the waste hierarchy has been consistently adopted across the city and this year's resulting actions continue to follow that theme. Alongside increasing recycling rates, actions also look at targeted waste audits to further understand how residents utilise the waste collection service.

3.70 Research waste reduction and barriers to recycling in Plymouth using community feedback and service data to inform a new campaign on waste reduction and recycling to improve the quality and quantity of Plymouth's household recycling.

3.71 Improve waste collection route planning to reduce failure demand by optimising the use of national and local data.

3.72 Continue to work with partners to ensure that, where practical and economical, recyclable material is processed and recycled in the UK – with a preference for the South West peninsula.

3.73 Work with the Government to evaluate the 2018 Resource and Waste Strategy and 2021 Environment Act to ensure local authorities are provided with effective powers and additional resources.

3.74 Engage schools through development of Plymouth education and activity resources to increase recycling and re-use.

3.75 Work with 'Borrow, Don't Buy: Plymouth's Library of Things' to highlight opportunities to repair and re-use tools and develop skills.

3.76 University Hospital Plymouth will work towards recording an 85% avoidance of waste going to landfill by 2025.



ENGAGEMENT AND RESPONSIBILITY

The City Council recognises that it needs to play a leadership role working with partners and the local community across the city to raise awareness and understanding around climate change.

Importantly we need to ensure everyone understands what part they can play in addressing the Climate Emergency from an individual level through to community groups, businesses and public sector organisations. The Climate Change Committee suggest that 59% of all reductions will require behaviour change, and as such engagement with all these groups is essential. We will work with the Youth Parliament, children, and young people across the city to ensure that their voice is heard in designing the actions needed to address climate change.

ENGAGEMENT AND RESPONSIBILITY Actions

The role of engagement in meeting our Climate Emergency ambitions is huge and should not be underestimated. The only way we can achieve our target is by working collaboratively and sharing responsibility. This sentiment is clearly reflected in the diversity and range of actions that are set for 2022, from tree planting to creating a climate investment fund.

3.77 University Hospital Plymouth will work towards embedding sustainability into every Trust service and activity by 2025.

3.78 Plymouth Marjon to create student sustainability champions in order to increase student engagement.

3.79 Plymouth Marjon to organise a climate crisis event for staff and students.

3.80 The University of Plymouth will support Plymouth enterprises to shift to a low-carbon economy through the Sustainability Hub: Low Carbon Devon project.

3.81 The University of Plymouth will support the management of the Future Plymouth 2030 webinar series and the delivery of presentations on the latest research.

3.82 The University of Plymouth will utilise and grow the usage of the Sustainability Hub for engagement with staff, students and the local partners around the Net-Zero Carbon agenda.

3.83 Continue the delivery of the Future Parks Accelerator Programme and associated projects to deliver nature-based improvements to strategic green spaces across the city.

3.84 Working with the creative and cultural sectors continue to deliver the Green Minds engagement programme, to support residents to take action for wildlife.

3.85 Deliver a nature-based leadership programme to bring together people from different sectors who share an interest in preserving the environment and to support the development of nature-based social enterprise.



ENGAGEMENT AND RESPONSIBILITY Actions

3.86 Deliver a green social prescribing programme, to promote engagement with nature for health and wellbeing.

3.87 Working with community volunteers and young people, deliver natural infrastructure enhancements to increase biodiversity across the city, offering training, work experience, jobs and apprenticeships.

3.88 Continue to deliver the Preventing Plastic Pollution Programme to remove plastic pollution raise awareness of the impact of single use plastics on the marine environment.

3.89 Continue to deliver the ReMEDIES and European Marine Site Recreation Impact Mitigation projects, which aims to identify areas for large scale restoration of seagrass beds.

3.90 Commence delivery of the Plymouth and South Devon Community Forest project, which will create 500 hectares of new woodland planting across the city by 2025.

3.91 Deliver a pilot permaculture project at Zoo Field in Central Park.

3.92 Undertake a review of Local Nature Reserves in the city and give consideration to further designations to mitigate biodiversity and habitat loss.

3.93 Building on the work of the Plymouth Skills Plan, we will support the development of green skills action plans for the key sectors of the Plymouth Economy, actively working with the Employment Skills Board, Skills Advisory Panel and Heart of the Southwest Local Enterprise Partnership and other key partners to secure funding to develop climate change skills.

3.94 Support businesses in the tourism industry to gain 'Green Tourism' accreditation, aiming to achieve 100 accreditations in 2022.

3.95 Provide direct support to businesses in sectors hard-hit by the pandemic to develop new business models and ensure a green, inclusive and sustainable economic recovery.



3.96 Continue to encourage partner organisations to adopt and align social value procurement policies and ensure carbon reduction is duly considered in their procurement initiatives.

3.97 Work with the Key Cities Group to benchmark innovative approaches to inform future climate actions and initiatives.

3.98 Review government commitments arising from COP 26 and the Net Zero Strategy in relation to new requirements on how Plymouth can meet its net zero ambitions by 2030.

3.99 Through the Community Empowerment programme, identify current engagement, intelligence and successful interventions around reducing emissions across the city to identify good practice and opportunities to expand, and any gaps to be addressed.

3.100 Continue to work with Cornwall Council, Devon County Council and South Hams and West Devon councils on developing climate emergency initiatives including sharing good practice.

3.101 Work with the Local Resilience Forum to scope a Plymouth Climate Resilience and Adaptation Plan.

3.102 Put in place interim planning guidance, pending the review of the Joint Local Plan, to provide even greater protection to the natural environment, and even higher standards of low carbon design and resilience, so that planning practice stays in tune with changing national policy and guidance and gives proper weight to the climate emergency.

3.103 Investigate the potential for the creation of a Carbon Offsetting Fund secured through Section 106 agreements to fund carbon saving initiatives where high energy efficient requirements in new developments cannot be met.

3.104 Commit to establishing ahead of the ' Acceleration Phase' of the Plymouth Climate Emergency to the identification of climate budgets, monitoring trajectories and year on year milestone targets for all 5 key climate emergency sectors (buildings, mobility, power and heat, waste and engagement and responsibility).



3.105 Organise a themed day at Plymouth Libraries on the topic of climate change.

3.106 Continue to raise awareness of climate change issues by supporting the Future Plymouth 2030 conference programme in partnership with the Royal Institute of British Architects.

3.107 Undertake the 2022 Plymouth Climate Challenge to support community-led climate change projects and initiatives.

3.108 Continue to engage with the Youth Parliament to ensure that the voice of children and young people is heard in relation to the climate emergency.

3.109 Continue to promote Ashden Let's Go Zero Campaign to Plymouth's primary and secondary schools to encourage all schools in the city to develop net zero carbon plans.

3.110 Hold Climate Emergency events for Plymouth schools by embedding it in health and wellbeing briefings.

3.111 Expand the programme for Climate Change Ambassadors across the whole of Plymouth.

3.112 Implement the Building (Flood) Resilience in Communities social innovation project in Lipson Vale and St Levan areas to improve and enhance community resilience and increase their ability to meet the challenges posed by climate change.

3.113 Continue to liaise with interested stakeholders to explore the opportunities and challenges of delivering land and maritime applications for hydrogen generation, supply and use for motorised transport in Plymouth.

3.114 Establish with partners a Climate Emergency Investment Fund to provide finance to support projects and initiatives to accelerate reductions in carbon emissions and lobby government to resource future provision.



CASE STUDY

Climate event at Central Library

'In this together', the first event to be held at Central Library since the pandemic, brought a total of 385 people to the Central Library on Saturday 9 October 2021.

The event was a collaboration between the Library Service and multiple local organisations intending to raise awareness and empower young and old to take action to protect our planet's green and blue spaces.

The event gave all participants an opportunity to:

- Learn from the Ocean Conservation Trust (National Marine Aquarium) about the impact of carbon on the coral reef.
- Find out about the dangers plastic pollution poses to our oceans and what we can do about it with Preventing Plastic Pollution project.
- Enjoy a beautiful seagrass sculpture and learnt about the importance of seagrass meadows in capturing carbon.
- Make their own contribution to the Art and Energy Collective's Moth to a Flame installation which is soon to be exhibited at the COP26 in Glasgow.
- Receive practical tips on recycling from the Council's street services team.
- Get support and practical advice to adopt active travel from Plymotion.
- Talk to our GreenMinds colleagues about their connection with nature.





CASE STUDY

Adapting to climate change

Whilst mitigation actions will help us to prevent further climate change, we cannot solely rely on them. We are already experiencing a changing climate in our city, from increased extreme rainfall events to increasing average temperatures. As such, we also need to take action to adapt to the changes we are currently facing – be it flooding or excessive heat. In 2022, the Council will undertake a number of improvement works to minimise the risk of flooding.

Building (Flood) Resilience in Communities (BRIC)

BRIC is a social innovation project working in the Lipson Vale and St Levan areas. BRIC aims to improve and enhance community resilience and to increase people's ability to meet the challenges posed by climate change. This project is particularly focussing on increasing flood preparedness by raising awareness through the use of new and creative community engagement methods, education and the creation of flood support networks.

Objectives:

- To engage with the Lipson Vale and St Levan communities using the Appreciative Inquiry model to build greater understanding, empathy and trust and to put people at the heart of decision making.
- To create two Flood Action Groups to support local residents be more prepared for a flood event, know how to act quickly and recover well.
- To install two alert and protection systems in the community that provide real-time information, warning residents of potential risks of flooding.

Climate change is still the biggest challenge facing our city's future and without rapid action the consequences will be severe on society, the environment and the economy. Plymouth cannot resolve global climate change alone, but we can play our part by participating fully in a climate emergency response.

This third action plan is a significant step in directing action that will reduce carbon emissions across Plymouth and advance us on a path to meet our net zero carbon ambition by 2030.

The Action Plan gives an overview of the work that will be undertaken in the next year as our emergency response to the climate crisis moves into the transition phase. The whole document will be reviewed and updated in one year's time.

If you think there is more you can do to help please contact us at ClimateEmergency@plymouth.gov.uk

PLYMOUTH
CITY COUNCIL

Produced by Strategic Planning and Infrastructure

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Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Date of meeting:	08 December 2021
Title of Report:	**Corporate Carbon Reduction Plan 2022**
Lead Member:	Councillor Maddi Bridgeman Cabinet Member for Environment and Street Scene,
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Paul Barnard, Service Director for Strategic Planning & Infrastructure
Contact Email:	Paul.Barnard@Plymouth.gov.uk
Your Reference:	CCRP2022
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The proposed Corporate Carbon Reduction Plan 2022 is submitted for consideration by the Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee ahead of the City Council meeting to be held on 24 January 2022, in accordance with the commitment made by the Cabinet Member for Environment and Street Scene at its meeting on 15 January 2020 (Minute 40 refers).

The City Council agreed the first Corporate Carbon Reduction Plan in December 2019. This marked a key milestone towards achieving a net zero carbon city by 2030. This plan was the subject to detailed review by this committee at its meeting on 21 October 2020 (Minute 7 refers). The Plan is a dynamic, living document that will be reviewed and updated yearly, and will evolve during the three phases of the Climate Change Action Plan Strategic Approach. The commitment is to produce annually a new action plan for each of the 11 years of the Climate Emergency period (2019-2030).

The Corporate Carbon Reduction Plan 2022 maintains the five key areas for action established by the previous plans to ensure that it is fit for purpose as actions are ramped up through the three strategic phases of the journey to zero carbon emissions by 2030. The 2022 Corporate Carbon Reduction Plan contains 35 actions. Most of the actions planned for delivery are financed from the prioritisation of existing capital and revenue budgets. Other actions included in the plan are financed from either already secured external funding or subject to specific funding bids. A few of the actions can only be delivered through the Climate Emergency Investment Fund which is yet to be funded and established. Some of the proposed actions will deliver measurable carbon reductions from the specific activities planned and these will be monitored going forward. Others, whilst not directly measurable, will nevertheless still contribute to reducing overall corporate carbon reduction impacts of the City Council estate and the delivery of its services and functions.

Recommendations and Reasons

It is recommended that the Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee:

1. Support and endorse the Corporate Carbon Reduction Action Plan 2022, noting that the Climate Emergency Investment Fund has yet to be funded or established.

   Reason: To set the direction of travel for the decarbonisation of Plymouth City Council's estate and functions, encourage and facilitate stakeholder engagement for further revisions to the plan in

accordance with the decisions of the City Council on 18 March 2019 to declare a climate emergency (Minute 89 refers) and to continue the commitment to prepare annual actions plans through to 2030, as first agreed on 16 December 2019 (Minute 7 refers).

Alternative options considered and rejected

Option 1 – Prepare a single plan covering the 11 years of the Climate Emergency – This was rejected as it would soon be out of date and not fit for purpose. Nor would it be sufficiently flexible and able to respond quickly to new science and new funding and other opportunities.

Option 2 – Do not prepare any Climate Emergency action plans – This was rejected as it would not be consistent with the decision of the City Council on 18 March 2019 to declare a Climate Emergency.

Relevance to the Corporate Plan and/or the Plymouth Plan

The actions being proposed in this report are consistent with the themes and values of the Corporate Plan 2021-2025 as well as those of the Plymouth Plan.

Implications for the Medium Term Financial Plan and Resource Implications:

The Corporate Carbon Reduction Plan 2022 sets out the direction and necessary corporate focus in relation to climate change issues for the 11 years of the emergency, with a detailed priorities for the next year. The finance and resourcing implications will be assessed against each individual action as they are progressed. As detailed business cases associated with the proposed actions set out in the Corporate Carbon Reduction Plan 2022 start to take shape, the City Council will need to consider the longer term resourcing implications. Budgets will need to be reassessed and capacity released to enable effective delivery of the necessary decarbonisation actions which will inevitably have to be ramped up each year through to 2030. It should be noted that a number of the actions already have funding secured either through the use of existing budgets or external grants, but further funding bids will be necessary.

Financial Risks:

As outlined in implications for Medium Term Financial Plan and Resource Implications section.

Carbon Footprint (Environmental) Implications:

As previously reported, climate science is clear that to a close approximation, the eventual extent of global warming is proportional to the total amount of carbon dioxide that human activities add to the atmosphere. So, in order to stabilise climate change, CO2 emissions need to fall to zero. The longer it takes to do so, the more the climate will change, with existential implications for humanity. Emissions of other greenhouse gases also need to be constrained. The Corporate Carbon Reduction Plan 2022 will drive and support the efforts to ensure the City Council is playing its part in laying the foundations to achieve net zero carbon by 2030.

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 report recommits the City Council to promote a fairer, more equal Plymouth by investing in communities, putting citizens at the heart of decision making, promoting independence and reducing health and social inequality. By embedding this commitment within the next Corporate Plan the City Council is acknowledging the importance of ensuring all communities have an opportunity to thrive in a zero carbon world.

Appendices

**Add rows as required to box below*

Ref.	Title of Appendix	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 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
		1	2	3	4	5	6	7
CCRP 2022	DRAFT Corporate Carbon Reduction Plan 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) *If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.*						
	1	2	3	4	5	6	7

Sign off:

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Originating Senior Leadership Team member: Paul Barnard, Service Director for Strategic Planning & Infrastructure

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

Date agreed: 23/11/2021

Cabinet Member approval: *Councillor Maddi Bridgeman Cabinet Member for Environment and Street Scene, via One-to-One Portfolio Holder meeting.*

Date approved: 23/11/2021

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CORPORATE CARBON REDUCTION PLAN 2022

PLYMOUTH CITY COUNCIL

Our journey to Net Zero – Leading by example and getting our own house in order by reducing emissions from our estate and operations to work towards net zero emissions by 2030

1 **Council buildings and estate**	Reducing energy consumption and developing programmes such as air and ground source heat pumps.	**20% reduction in water use**
2 **Vehicles/ fleet**	Emissions from core fleet will be cut by electrification of cars and vans.	**Over 175tn CO_2 reduced by 2024**
3 **Roads and street furniture**	Opportunities to reduce carbon emissions from maintenance and improvement of roads and paths and streets lights is being considered.	**50% less CO_2 from street lights**
4 **Staff and Councillor travel at work**	Targeting 90% of business travel using public transport, active travel or electric vehicles by 2030.	**90% sustainable business travel**
5 **Waste minimisation which is Council generated**	Adopting an electronic document by default (with limited exceptions) approach to all Council meetings to secure a 50% reduction in printing by 2023.	**50% less paper at council meetings**
6 **Governance**	Reviewing the City Council governance arrangements to accelerate carbon reduction initiatives beyond 2022.	
7 **Behaviours**	Changing behaviours, implementing smarter working practices and maximising the use of technology.	
8 **Engagement**	Stepping up engagement to take staff with us on the net zero journey.	
9 **Finance – strategic investment**	Preparing the groundwork to enable projects to meet net zero commitments from 2022.	

It gives me great pleasure to introduce the third of our Corporate Carbon Reduction Plans, setting out how as a City Council we will seek to move towards net zero by 2030 following our climate declaration of March 2019. Although the City Council itself only accounts for 1% of total emissions in Plymouth, and despite the on-going disruption of the pandemic, we must get our own house in order and show leadership by decarbonising the services we provide.

This 2022 action plan has been streamlined and focussed on reducing emissions from our buildings and our fleet. We are also continuing with actions relating to the highway, staff and councillor travel, and minimising waste.

We know we have a lot more work to do, and will strive to bring forward innovations and new funding to deliver actions that will make a difference to how we deliver services in the future.



Maddi Bridgeman

Cabinet Member for Environment and Street Scene, Plymouth City Council

Message to staff - how can you help reduce your own carbon footprint?

Where you can:

- Cut consumption and waste
- Reduce, reuse and recycle all that can be
- Only print as a last resort
- Use less water
- Use less energy
- Turn the lights off when leaving rooms
- Eliminate single use plastic
- Try to use sustainable travel arrangements
- Consider eating less meat and dairy
- Think about sustainable fashion choices
- Consider buying local
- Talk about the changes you make and share best practice

ACTION PLAN

Focus	Ref No	Actions
1 Council buildings and estate	3.1.1	Prepare a 5 year rolling plan to address the retained corporate buildings in a priority order with a fabric first approach to energy saving.
	3.1.2	Develop a costed programme of air and ground source heat pumps required to decarbonise City Council buildings.
	3.1.3	Develop a Water Reduction Action Plan to achieve a 20% reduction in water use.
	3.1.4	Reduce energy consumption by minimising the temperature in all council offices following consultation with staff.
	3.1.5	Finalise a grassland management policy to maximise opportunity to manage areas for habitat to counter habitat loss and species decline.
	3.1.6	Investigate the use of City Council sites and parks for electricity storage.
	3.1.7	Implement a Sustainable Procurement Policy which specifically includes a minimum net zero certification for all City Council new development projects.
2 Vehicles/fleet/ transport/equipment	3.2.1	Continue to implement a vehicle decarbonisation programme so all cars and vans are converted to EVs by 2024.
	3.2.2	Commit to having a zero carbon vehicle for the Lord Mayor by 2023 through either a renegotiation of the lease contract or a replacement zero carbon vehicle.
	3.2.3	Undertake a review of school transport procurement criteria and routes to reduce emissions from 2023.
	3.2.4	Provide personalised travel advice to young people to be more confident of using public transport.
	3.2.5	Minimise unnecessary journeys for street bin emptying by investing in physical and digital solutions.
3 Roads and street furniture, including lighting and traffic lights	3.3.1	Introduce a more efficient payment systems into all council multi-story car parks to enhance environmental outcomes.
	3.3.2	Undertake a pilot 'Sustainable Street Lighting' initiative to save energy with a view to reducing carbon emissions by 50% by 2030.
	3.3.3	Pilot the use of modern technology to change the road surface dressing methodology to reduce CO_2 output.
	3.3.4	Research and pilot further opportunities to reduce carbon emissions from the maintenance and improvement of roads and paths.

ACTION PLAN

Focus	Ref No	Actions
4 Staff and Councillor travel/travel at work	3.4.1	Aim for 90% of business travel to be using public transport, active travel or electric vehicles by 2030.
	3.4.2	Introduce a Zero Emissions Travel Incentive Scheme to encourage employees to commute to work by cycling and other sustainable transport options.
	3.4.3	Support the delivery of events such as Car Free Days, to promote the benefits of public transport, walking and cycling to staff.
	3.4.4	Work with the Key Cities Group to explore innovative approaches to staff and councillor travel options to inform future climate actions and initiatives.
5 Waste*	3.5.1	Adopt an electronic document by default (with limited exceptions) approach to all Council meetings to secure a 50% reduction in printing by 2023.
6 Governance	3.6.1	Implement a Climate Decision Wheel for all key decisions and all capital project business cases.
	3.6.2	Prepare Emissions Profiles for all City Council services and embed climate actions in departmental service plans during 2022.
	3.6.3	Update the taxi licensing policy to encourage greener vehicles and work with taxi drivers and operators to move towards a ULEV taxi fleet by 2030.
	3.6.4	Review the City Council governance arrangements for the acceleration of carbon reduction initiatives beyond 2022.
7 Behaviours	3.7.1	Implement smarter working practices by maximising the use of technology to support home and flexible working, including the use of shared hubs with partners.
	3.7.2	Develop education and outreach programmes with maintained schools to deliver a programme of awareness raising of green issues for children of all ages.
	3.7.3	Introduce more low carbon menus in City Council and partner catering facilities.
8 Engagement	3.8.1	Implement 'carbon literacy' training to City Council staff, Green Champions and Councillors in 2022 to achieve silver accreditation and enable progression to gold accreditation by 2024.
	3.8.2	Undertake a Climate Change Conference for City Council staff to capture ideas for future carbon reduction actions.
	3.8.3	Review government commitments arising from COP26 and the Net Zero Strategy in relation to new requirements on how the City Council decarbonises its services.
9 Finance/strategic investment policy and procurement	3.9.1	Introduce a contract award weighting for climate change in procurement processes where relevant and proportionate.
	3.9.2	Develop a set of standard procurement questions which assess the suitability of a supplier to deliver a contract in relation to addressing the climate emergency.
	3.9.3	Reduce the number of out of city placements to minimise the need for travel and reduce emissions for foster child placements.
	3.9.4	Establish a City Council Carbon Offsetting Fund to enable projects to meet net zero commitments from 2022.

*Waste minimisation which is Council generated

Brexit, Infrastructure and Legislative Change Overview Scrutiny Committee

Work Programme 2021-22

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 Helen Prendergast, Democratic Adviser on 01752 668000.

Date of meeting	Agenda item	Prioritisation Score	Reason for Consideration	Responsible Cabinet Member /Officer
14 July 2021	~~Corporate Carbon Reduction Plan: Update on Progress~~	~~(5)~~	~~Recommendation from Committee for a progress update~~	~~Councillor Maddi Bridgeman/Paul Barnard~~
	~~Climate Emergency Action Plan: Update on Progress~~	~~(5)~~	~~Recommendation from Committee for a progress update~~	~~Councillor Maddi Bridgeman/ Paul Barnard~~
	~~Plymouth and South Devon Freezone~~	~~(5)~~	~~The impact of the Freezone for Plymouth~~	~~Councillor Nick Kelly/Kevin McKenzie~~
	~~Mayflower 400 Progress Update~~	~~(4)~~	~~The impact of Mayflower 400 on Plymouth~~	~~Councillor Mark Deacon/Charles Hackett~~
15 September 2021	~~Economic Intelligence Update~~	~~(5)~~	~~Receive a progress update~~	~~Councillor Nick Kelly/Amanda Ratsey~~
	~~Plymouth Bus Service Improvement Plan 2021~~	~~(5)~~	~~Impact of the national Bus Strategy~~	~~Councillor Jonathan Drean/Paul Barnard~~
	~~Finance Monitoring Report July 2021~~	~~(5)~~	~~Issue identified by Scrutiny Management Board~~	~~Councillor Nick Kelly/David Northey~~

Date of meeting	Agenda item	Prioritisation Score	Reason for Consideration	Responsible Cabinet Member /Officer
	~~Corporate Plan Performance Report Quarter One 2021/22~~	~~(5)~~	~~How the Council was performing against its priority performance indicators~~	~~Councillor Nick Kelly/Rob Sowden~~
8 December 2021	National Marine Park	(5)	Review of the Park following bid announcement	Councillor Nick Kelly/Charles Hacket
	Plymouth Culture Plan Annual Update	(5)	To review the impact of the Culture Plan (following scrutiny of the plan in March 2021)	Councillor Mark Deacon/Hannah Harris
	Visitor Plan Annual Update	(5)	Review the Visitor Plan following scrutiny of the plan	Councillor Mark Deacon/Amanda Lumley
	Climate Emergency Action Plan (CEAP) 2022	(5)	Scrutiny prior to consideration at Full Council	Councillor Maddi Bridgeman/Paul Barnard
	Corporate Carbon Reduction Plan 2022 (CCRP)	(5)	Scrutiny prior to consideration at Full Council	Councillor Maddi Bridgeman/Paul Barnard
10 December 2021	Budget Preparatory Session	(5)	Preparatory work for Budget Scrutiny	Councillor Nick Kelly/Councillor Drean Directors/David Northey
23 February 2022	Mayflower 400 Wrap Up (including international engagement)	(5)	The impact of Mayflower 400 on Plymouth (including international engagement)	Councillor Mark Deacon/Charles Hackett
	Plymouth and South Devon Freezone	(5)	The impact of the Freezone for Plymouth (onging issue)	Councillor Nick Kelly/David Draffan
	Box Opening Review and 2022 Programme	(5)	Scrutiny review of the opening of The Box and the 2022 programme	Councillor Mark Deacon/Victoria Pomery
	Plymouth Plan Annual Report	(5)	Review the Annual Report	Councillor Patrick Nicholson/Paul Barnard

Date of meeting	Agenda item	Prioritisation Score	Reason for Consideration	Responsible Cabinet Member /Officer
	Planning Reform Bill	(5)	Scrutiny of the implementation of the Reform Bill	Councillor Patrick Nicholson/ Paul Barnard
	Corporate Carbon Reduction Plan 2021 Outturn Report	(5)	Scrutiny recommendation to receive a six month update on progress	Councillor Maddi Bridgeman/Paul Barnard
	Climate Emergency Action Plan 2021 Outturn Report	(5)	Scrutiny recommendation to receive a six month update on progress	Councillor Maddi Bridgeman/Paul Barnard
Items Raised by the Committee to be scheduled for 2021/22				
TBC	Environment Bill	(5)	Identified for consideration by the Committee at its July 2021 meeting	Councillor Jonathan Drean/Paul Barnard
TBC 2022	Sustainable Transport in the City	(5)	Identified for consideration by the Committee at its July 2021 meeting	Councillor Jonathan Drean/Paul Barnard
Issues Idenfitifed for Select Committee Reviews				
February 2022	The Delivery of Taxi Services within Plymouth	(5)	The issues impacting the delivery of taxi provision within the city	Councillor John Riley/Rachael Hind

Annex 1 – 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	**1-2**

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee – Tracking Decisions 2021/22

Minute No.	Resolution	Target Date, Officer Responsible and Progress
Minute 15 Policy Update 15 September 2021	The Committee sought clarification as to whether the Council had applied for a share of the £30m Changing Places toilets (CPTs) fund which was administered by the Ministry of Housing, Communities and Local Government.	**Date:** October 2021 **Progress:** Information requested but to date no response has been provided.
Minute 16 Plymouth Bus Service Improvement Plan 15 September 2021	The Committee agreed – (1) note the timescales for completion of the Plymouth Bus Service Improvement Plan 2021 and the requirement to subsequently publish an Enhanced Partnership Plan and Scheme; (2) endorse the ambitions of the Plymouth Bus Service Improvement Plan 2021 and the aspiration to make Plymouth' buses more frequent, more reliable, easier to understand and use, better co-ordinated and cheaper; (3) endorse the thematic proposals of the Plymouth Bus Service Improvement Plan 2021, as a comprehensive suite of measures which support the policies of the Plymouth Plan and the needs of Plymouth's current and future bus users. The Committee requested that – • a map was made available detailing the bus routes in the city, colour-coded to identify the frequency of the services in order to compare the bus services in the city centre to those on the outskirts; • the bus user engagement reports were made available to the Committee.	**Date:** October 2021 **Progress:** the plan was considered by Cabinet on 12 October 2021 at which the Cabinet agreed to – • Note the timescales for completion of the BSIP and the requirement to subsequently publish an Enhanced Partnership Plan and Scheme; • Endorse the ambitions of the BSIP and the aspiration to make Plymouth's buses more frequent, more reliable, easier to understand and use, better co-ordinated and cheaper; • Endorse the thematic proposals of the BSIP as a comprehensive suite of measures which support the policies of the Plymouth Plan and the needs of Plymouth's current and future bus users; • Endorse the emerging priorities of the BSIP; • Delegate approval of the final BSIP to Cabinet Member for Transport. Further information had been emailed (28 November 2021) to Councillors relating to the following –

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee – Tracking Decisions 2021/22

		• Plymouth Bus Users – Focus Group Report • Plymouth Lapsed Bus Users – Focus Group Report • Plymouth Non Bus Users – Focus Group Report
Minute 17 Economic Intelligence Update 15 September 2021	The following information would be provided to the Committee (outside of this forum) – • whether the increase in growth of part-time work had reduced opportunities of full-time work in the city; • the unemployment statistics for the past five years.	**Date:** October 2021 **Progress:** Information is contained within Appendix A.
Minute 18 Finance Monitoring July 2021 15 September 2021	A written response would be provided regarding the narrative relating to the saving target for Weston Mill, bulky and trade waste.	**Date:** October 2021 **Progress:** Information requested but to date no response has been provided.
Minute 19 Corporate Plan Performance Report Quarter One 2021/22 15 September 2021	The Committee agreed – 1. that through the Chair of the Performance, Finance and Customer Focus Overview and Scrutiny Committee (Councillor Penberthy), the issue of the relevance of a number of the key performance indicators would be raised at the forthcoming Scrutiny Management Board meeting in October 2021. The Committee requested the following information (outside of this forum) – 2. The percentage of Councillors and employees that had completed the e-learning training programme on climate change;	**Date:** October 2021 **Progress:** With regard to (1): a discussion on the Corporate Plan Performance was held at the Scrutiny Management Board meeting on 20 October 2021. With regard to (3): All but 2 of the 690 demolitions relate to homes demolished in Devonport, North Prospect and Barne Barton during the Joint Local Plan period 2014-2021. The other 2 units were in Plympton. (Note: there will have been more losses in Devonport and North Prospect prior to 2014). To date the number of new homes built to replace the demolitions have been 1,300 homes in Devonport and 850 homes in North Prospect, of which approximately 50% have

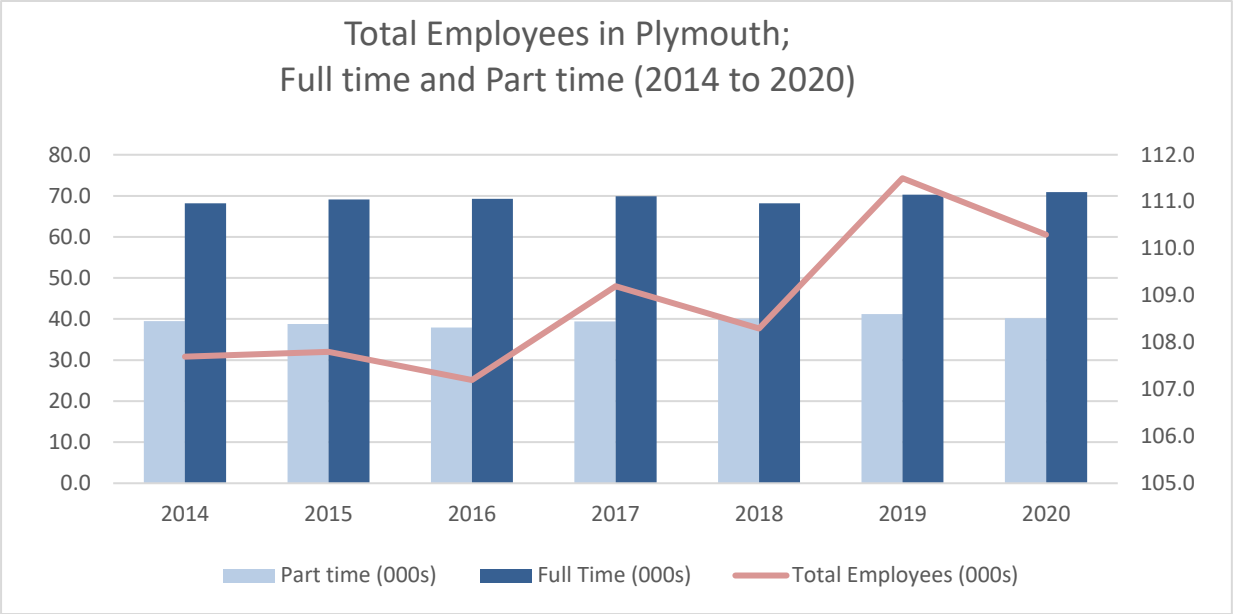
	3.	The number of quality affordable homes that had been replaced.	been a mix affordable homes for rent and low cost homeownership.

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Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

Economic Update Response to committee meeting on 15 September 2021

Whether the increase in growth of part-time work had reduced the opportunities of full-time work in the city:



In Plymouth, over the period shown above (2014 to 2020), the number of full-time employees has grown by 3.96%, the number of part-time employees has grown by only 1.77%. Subsequently, the total number of employees in Plymouth has grown by 2.41%.

Based on this data, over the 7 year period, the growth in part-time employee numbers appears to have not reduced the opportunities for new full-time employment. The growth rate in full-time employees has been greater than that of part-time employees.

The provision of the unemployment statistics for the past five years:

Unemployment Rate (16-64 years old)	**Plymouth**	**South West**	**United Kingdom**
Date	**Percent**	**Percent**	**Percent**
Jan 2016-Dec 2016	5.0	4.2	5.0
Jan 2017-Dec 2017	5.5	3.4	4.5
Jan 2018-Dec 2018	4.6	3.2	4.3
Jan 2019-Dec 2019	4.6	3.2	4.0
Jan 2020-Dec 2020	4.6	4.0	4.7

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