

VISITOR ECONOMY BUSINESS AND DESTINATION MANAGEMENT PLAN FOR PLYMOUTH 2021 TO 2030

WRITTEN FOR DESTINATION PLYMOUTH

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1. OVERVIEW

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

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

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

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

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

This Business Plan was largely developed in the year prior to the **Mayflower 400** commemorations in Plymouth and nationally. In the year when Plymouth announces it will be the first **National Marine Park** in the UK and prior to the opening of '**The Box**', the largest single cultural attraction to open in the UK in 2020. There are exciting plans for development of the creative industries, digital, art and cultural organisations alongside the significant marine credentials of the city linked to Oceansgate, 'Smart Sound' and opportunities for more access to the water. The city has declared a '**climate emergency**' and has an ambition to be **carbon neutral by 2030** and eliminate as far as possible single use plastics. Our overarching approach to development and management of our destination needs to be sustainable for the long term to support our community and our businesses as well as the millions of visitors that enjoy our 'Ocean City' annually.

This plan will build on these opportunities and ensure that we continue to approach growing the visitor economy in an innovative and creative way to meet our targets for the future.

2. VISION

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

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

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

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

Ambitions:

Our strategic ambition statements:

1. ***'Our national marine park will be globally recognised for amazing experiences, by, on, in and under the ocean...'***
2. ***'We will become one of the UK's first carbon neutral destinations by 2030 supporting our city vision'..***
3. ***'We will be known internationally for jaw dropping art, authentic cultural and heritage experiences and our urban spirit..'***
4. ***'We will have transport infrastructure to match our ambition, with seamless connectivity to international arrival hubs and be known for our water transport services...'***
5. ***'We will be recognised nationally as best in class for our digital, creative and cultural approach in everything we do...'***
6. ***'Plymouth will be known nationally as a UK top ten city break...'***
7. ***'We will be renowned as the #1 must do destination in Devon & Cornwall....'***
8. ***'We will be known as the destination of choice for meetings, events and conferences in Devon and Cornwall....'***

i. OBJECTIVES AND TARGETS

Objectives:

Tourism includes business tourism, social visitors staying for a function, those here to study and day visitors i.e. anyone undertaking an activity that is not in their normal routine. These are important markets for Plymouth but not always recognised as tourism. 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 importance of these definitions for Plymouth is the recognition that 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**, bringing employment in tourism to just under 9,000 jobs¹.

Our targets are:

- **To grow visitor spend by 30% from £347 million to £450 million in a decade**
- **To increase the total visitor numbers by 15% from 5.4 to 6 million by 2030**

Here is the market focus for delivering that growth.

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

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

3. OUR THEMES

i. Our Blue-green city

‘Our National Marine Park will be globally recognised for amazing experiences, by, on, in and under the ocean...’

Plymouth is Britain’s Ocean City, home to the **UK’s first National Marine Park** uniquely offering the opportunity for visitors to explore the ocean in exciting ways and to enjoy a city with a breath-taking open green waterfront edge that stretches for miles. This reinforces the strength of our green spaces, our parks, which cover forty per cent of Plymouth; complemented by our two country parks and Dartmoor National Park.

Plymouth Sound is one of the world’s most important and visually stunning natural harbours with multiple designations for protected habitats and species. It is home to the largest naval base in Western Europe is an ocean waterfront, a port and a harbour. The city has very strong marine credentials and a proud naval heritage. Our substantial national fishing fleet, international fish market, marine research and leisure facilities are internationally recognised. That is a **unique suite of assets for a UK waterfront city.**

We need to do much more to deliver its visitor potential. That means delivering excellent water-based experiences and making further investments to create new vibrant quarters along the waterfront, presenting our blue and green environment as a single offer and increasing the opportunities for visitors to enjoy being by, on, in and under the water. At the same time, we need **to protect and preserve our authentic natural and historic environment** to ensure it remains accessible for our communities as well as visitors and future generations to enjoy. This means encouraging everyone to **reduce plastic use, reduce their carbon footprint and act now to protect and preserve our ocean and our green spaces so 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

Blue-Green products

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

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

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

ii. Our brilliant culture and heritage

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

Plymouth is Britain’s Ocean City – the sea defines the unique history of the city and has shaped its culture, its heritage and its people over generations. Currently the cultural offer of Plymouth is not widely known or understood, however, is beginning to receive recognition and attract new and increased audiences. Initiatives such as Plymouth Art Weekender, Fab City, iMayflower, British Art Show and Illuminate demonstrate the innovation and leadership of the creative and cultural organisations and individuals driving cultural development within the city. Further opportunities exist to showcase the city, attracting new visitors and securing its position as an international cultural destination. There exists a timely opportunity to realise the full benefit of these cultural assets and make a statement about 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.

By 2030, Plymouth will be recognised internationally as a cultural destination capable of curating world-class experiences, which can be enjoyed by all. Destination Plymouth will align its efforts with key stakeholders in the visitor, cultural and business community to ensure culture and heritage is a driving force for economic productivity and social prosperity. We will continue to use events, festivals, sport and significant celebration years to show case what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show for 2021.

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

What does this mean for our visitors and our community?

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

Cultural and heritage product:

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

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

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

iii. Premier destination

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

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

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

Partnership:

Destination Plymouth has been key to the success of our first Visitor Plan by leading and co-ordinating the partnership that has delivered robust outcomes over the last eight years. This partnership unites public and private sector interests in its Board and through its approach to delivery, secures grants and commercial income to support destination marketing and operates a successful membership which brings together all of the businesses involved in tourism. We are committed to equalities and diversity in everything we do. It is at the core of our work with partners to make Plymouth a vibrant waterfront city.

People:

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

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

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 southwest to promote and secure radical improvements to the quality and resilience of Plymouth’s road, rail, air and sea connectivity. City partners will work together to deliver innovative and sustainable transport solutions using the water to reinforce Plymouth Britain’s Ocean City, including park & float and improved ferry and small boat services that take visitors to different points along the city’s coast and an internationally renowned cruise and ferry terminal.

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

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

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

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

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

Our distinctive ‘Britain’s Ocean City’ brand:

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

Critical to a successful visitor economy is distinctive targeted marketing, promotion, 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’ mean’s something distinctive and appealing to target visitor markets for leisure, study and business.

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

4. THE BUSINESS PLAN

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

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

We currently have 5.4 million visitors annually and visitor spend is £337 million

- To create and sustain a 33% growth in jobs in the visitor economy. That means 4,000 new jobs in the city by 2026, with an objective to achieve 2,800 of these by 2020

Employment within the sector in 2019 is currently 7,985 employees in total 10% growth

- To increase GVA by £84.4m

GVA has increased by £53.2 million in 2019

- To strengthen Plymouth's position as the regional centre for Devon & Cornwall – by creating a great day out and evening destination

Perception research undertaken in 2017 shows Plymouth as the number 1 destination in Devon and Cornwall for shopping, heritage, evening and visitor attractions

- To raise the profile of Plymouth and its positioning as a place to visit and invest - particularly focusing on its outstanding marine credentials

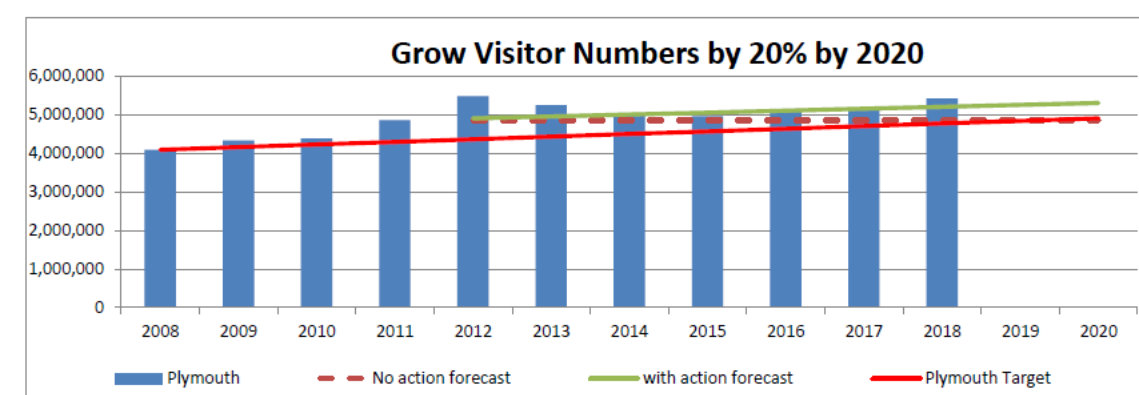
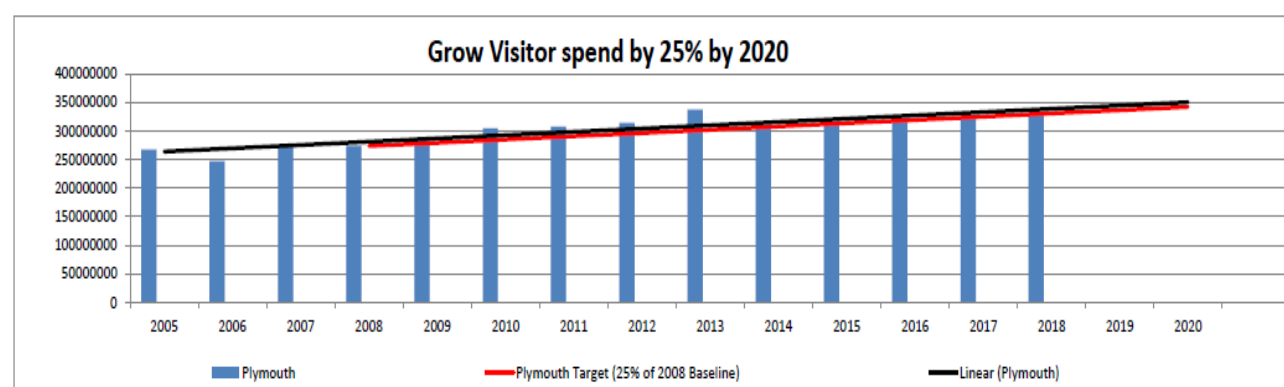
78% of visitors surveyed in 2017 said Plymouth appealed to them because it is a waterfront destination with 81% of visitors associating Plymouth with the waterfront

In 2019 Plymouth was rated by Conde Nast magazine as the third best place in the world to visit in 2020

- To generate demand for more places to eat and drink, distinctive independent shops, quality places to stay and an exceptional cultural offer that local people and visitors can enjoy

In 2019 British Land opened a £53 million new leisure complex 'The Barcode' with a 12 screen cinema and ten bars and restaurants

A major 'Star project' at Royal William yard is nearing completion with the refurbished 'Melville building' opening in 2020



I. 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 1 must do destination in Devon and Cornwall.

Destination marketing

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

- We will continue to target the USA, 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

Below we have set out some key challenges and opportunities, which may affect our ability to achieve the vision, targets and ambitions in our plan.

II. Challenges and opportunities:

Challenges	Opportunities
Funding <ul style="list-style-type: none"> – Local Authorities working on austerity budgets with tourism not a mandatory service – Finding funding to sustain the Executive remains a challenge post Mayflower 400 in March 2021 – Diminishing public funding threatens continued capital infrastructure and revenue programming investment – Private Sector funding is still difficult to secure with only a small number of larger businesses putting significant funding into destination marketing – Further work to integrate Visitor Economy into other grant funding bids is required e.g. Future High Streets, Transforming Cities Fund, NLHF Horizons fund 	Funding <ul style="list-style-type: none"> – Development of Tourism Zone for Great South West region – Tourism sector deal grant funding – Discover England Fund 2 opening late 2020 – Continuation of 'Founder' funding model
Governance <ul style="list-style-type: none"> – The DP Board will need a longer term strategic view of their role – Future structures need to take account of potential funders – The private sector needs to drive and support destination marketing activity more to unlock the potential of the City to grow market share – Inclusivity, diversity and accessibility are key aims of the new Visitor Plan the Board needs to reflect this 	Governance <ul style="list-style-type: none"> – 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 – Review DP Board skills and compilation
Partnerships <ul style="list-style-type: none"> – Greater engagement of a wide range of city and private sector stakeholders is required to support growth – Capacity of such groups remains limited and competition for scarce private sector funding between groups remains a challenge – Waterfront BID due for renewal in 2022 – Plymouth Culture re-structuring 	Partnerships <ul style="list-style-type: none"> – 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 <ul style="list-style-type: none"> – Persistent low awareness of broader product offering, ease of access and reasons to travel here among key UK segments – London continues to dominate international visitors' perceptions of the UK, still hard to get volume into the regions – Lack of brand coherence and strong visual identity for Plymouth as Britain's Ocean City – Low awareness of Plymouth as a city for business investment – Insufficient funding for strong place brand approach – Specialist skills in marketing team need strengthening 	Brand <ul style="list-style-type: none"> – Plymouth's brand is getting stronger and better known amongst some key visitor markets – National Marine Park concept supports BOC brand – Making more of organisations or partners that 'export' the Plymouth brand such as Plymouth Gin, Princess Yachts, – Continue to lever off MF 400 into US market – Brand 'evolution' to more experiential, thematic creative approach – National Marine Park

Challenges	Opportunities
Investment Product gaps <ul style="list-style-type: none"> – 5 star city centre hotel to complement Boringdon – only 1 in Plymouth – 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 – Re-imagined National Marine Aquarium as gateway to National Marine Park – Continue investment in public realm, gateways and visitor welcome 	Investment <ul style="list-style-type: none"> – 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 2025 – 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 <ul style="list-style-type: none"> – 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 	Events and cultural programming <ul style="list-style-type: none"> – Post MF 400 there are planned events in 2021 with British Art Show, and year of the coast – Making more use of key city locations including Hoe, waterfront, central park etc. as a major events stage – Working closely with cultural organisations to develop ‘programming’ rather than events in key city spaces
Business tourism <ul style="list-style-type: none"> – The conference, meetings and exhibition marketplace is hugely competitive with new facilities opening all the time – only sustained and substantial marketing and PR investment will guarantee success over the next five years 	Business tourism <ul style="list-style-type: none"> – 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
Leisure tourism <ul style="list-style-type: none"> – 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 	Leisure tourism <ul style="list-style-type: none"> – 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 – Key location within Devon/Cornwall largest UK visitor destinations

Challenges	Opportunities
<p>Skills and employment</p> <ul style="list-style-type: none"> – Low productivity driven by seasonality and high staff churn – Developing and retaining sufficient high quality talent in key skills areas e.g. cheffing and future sector leaders/managers – Promoting skills and career opportunities – Skills are improving within the sector but more people need to view the sector as a first choice career – Persuading sector businesses to maximise the use of apprentices as a means of supporting business growth – Raising the profile of skills development with both employers and employees – Encouraging providers to be more responsive to industry needs – Nurturing new Visitor Economy businesses – Risk of Brexit affecting resources and language skills 	<p>Skills and employment</p> <ul style="list-style-type: none"> – 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 city with University, City College and key stakeholders to drive this agenda
<p>Digital</p> <ul style="list-style-type: none"> – 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 	<p>Digital</p> <ul style="list-style-type: none"> – 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 move towards digital only approach – Opportunity for visitor focussed smart card linking transport and attractions – Virtual and augmented reality developments for showcasing city
<p>Sustainability, green tourism and accessibility</p> <ul style="list-style-type: none"> – We need to 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 	<p>Sustainability, green tourism and accessibility</p> <ul style="list-style-type: none"> – 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

Challenges	Opportunities
<p>Transport Connectivity</p> <ul style="list-style-type: none"> – 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 	<p>Transport Connectivity</p> <ul style="list-style-type: none"> – Potential for growth exists through Exeter and Newquay airports into closer European and US markets via major hubs including Amsterdam and Dublin – GWR getting 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 and West Pier provides opportunities for more cruise – Transforming cities fund will provide more integrated city transport service including cycling/water links – Major transport hub for Devon/Cornwall region – Rapid movement towards zero carbon and green tourism
<p>Market Intelligence</p> <ul style="list-style-type: none"> – Benchmarking nationally is not always consistent in terms of participation 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 1 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 	<p>Market Intelligence</p> <ul style="list-style-type: none"> – Up to date and consistent data will inform market share growth – Improved intelligence through ONS/VisitEngland Tourism Intelligence Unit linked to national data project – South West research and data hub - opportunity to provide added value research services – Consider 'T'Stats as destination source data

5. STAR PROJECTS 2020 TO 2030

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

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

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

1. THEME: BLUE- GREEN CITY
a) PROJECT NAME: OCEAN PLAYGROUND
SUMMARY OF PROJECT: Our aims is to build on our waterfront assets by providing access all year round for activities by, on, in and under the water. Specific projects include Mount Batten Watersports Centre and Hoe foreshore
PROJECT RATIONALE/OBJECTIVES: Links to strategic ambition number 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: <ul style="list-style-type: none"> • 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 <p>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. Feedback from consultees has demonstrated that there is appetite 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 etc. and then take their ‘après-sea’ activities close by the water. Research indicates that the target audiences for water-based activities are higher spending with longer dwell times. Ability to secure major on water events going forwards – e.g. national sailing championships is limited and requires long-term infrastructure to achieve the city’s ambitions.</p>
KEY LOCATIONS: Key access areas to the water including: Mount Batten Watersports Centre, Hoe Waterfront, Millbay, Royal William Yard, Devonport and Tamar areas, Drake’s Island, Mt Edgcumbe
APPROACH: <ul style="list-style-type: none"> – We will take the lead on development of visitor led site opportunities to help encourage inward investment through promoting and packaging key locations, which can provide commercial opportunities for access to the water, recreational opportunities beside the water and on the water. – Develop regeneration opportunities through exploring freehold or long leasehold land deals and working with developers to seek solutions. – We will work closely with local businesses to encourage them to take advantage of opportunities where possible and to enable them to be ready to go to market with new products aimed at specific target audiences.
PARTNERS: Mount Batten Watersports Centre, Waterfront Partnership, PPML, Urban Splash, Royal Navy
TIMESCALE: 3 to 5 years

2. THEME: BLUE- GREEN CITY
b) PROJECT NAME: STORIES OF THE OCEAN – PLYMOUTH SOUND NATIONAL MARINE PARK
SUMMARY OF PROJECT: Using innovative digital technology, marine science and our local people to tell our story. 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 (for example; Illuminate). Links to ‘Smart Sound’ and ‘M Subs’ autonomous vessel technology.
PROJECT RATIONALE/OBJECTIVES: Links to strategic ambition number 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 interpret the marine environment and motivate them to act to help preserve the environment for the long term. Objectives of this project include: <ul style="list-style-type: none"> • Increasing visitor numbers • Encourage new audiences to visit • Provide higher levels of accessibility for all audiences through technological solutions • Showcase the city’s credentials as a cutting edge marine technology centre globally • Engage more and connect the sea and waterfront with visitors and the local community • Support the National Marine Park in building civic pride through ocean heritage.
KEY LOCATIONS: City wide but particularly linked to ‘sound’ and waterfront, Oceansgate and Devonport working with key partners including NMA, PML, MBA, Drakes Island, Plymouth Boat Trips, Plymouth Fisheries etc.
APPROACH: <ul style="list-style-type: none"> – Identify specific narrative connected to Plymouth and its maritime vision – Create trails and points of interest which highlight key aspects and areas of the city – Development of immersive technologies linked to Market Hall dome project/‘Smart sound’ – Engage with community to develop ‘ambassadors’ who will show and tell the stories, potential to develop ‘Mayflower Makers’ post 2020 – Create ‘bookable’ visitor product
PARTNERS: RIO, Oceansgate, Navy, NMRN, University, Plymouth Culture, Octopus project
TIMESCALE: 3 to 5 years

3. THEME: BLUE- GREEN CITY
c) 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.
PROJECT RATIONALE/OBJECTIVES: Links to strategic ambition number 1: Our national marine park will be recognised for amazing experiences by, on, in and under the ocean <ul style="list-style-type: none"> • Improve 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, Fish Market, Sutton Harbour
APPROACH: <ul style="list-style-type: none"> – Work with key strategic partners to develop a vision and shared narrative for the ‘Gateway’ – Identify priority projects and help facilitate feasibility and resource assembly – Support grant funding opportunities – Develop visitor product connected to the site <p>Stakeholder consultation revealed a strong appetite for projects connected to the development of this area of the city linked to the emerging concept of a National Marine Park. In particular, a strong desire to make the Fish Market a visitor friendly attraction, highlighting the importance of fishing and telling the story of sustainable fishing linked to the oceans. Interpretation could include bringing the market to life as in ‘Seattle’ where the market is ‘theatre’ with traders openly ‘performing’ with their catch to tell their stories daily. This is a way to create a new dimension on the waterfront and bring to life the whole marine eco system with key messages connected to the National Marine Park and its sustainability. There is an associated desire to work with local restaurants and chefs to promote seafood through using locally caught fish and activities to support Plymouth as one of the best places in the UK for fresh fish. The National Marine Aquarium also featured heavily here as a way to interpret and amplify this messaging and introduce educational elements linked to additional tours on the water. Plymouth will provide a number of entry points to make the national marine park accessible for everyone and build on its pioneering work on ocean literacy, particularly with the public and with schoolchildren, through the work of the Ocean Conservation Trust at the National Marine Aquarium. A key gateway will be prioritised at Sutton Harbour, the home of Plymouth’s fishing fleet and of the National Marine Aquarium, with its easy access to Drake’s Island and the National Marine Park. This site will be developed successively over the next 10-year period, in line with The United Nations Decade of Ocean Science for Sustainable Development (2021-2030).</p>
PARTNERS: Sutton Harbour Holdings, National Marine Aquarium, Plymouth Marine Laboratories, Plymouth University, MBA, Blue Marine Foundation and otehrs
TIMESCALE: 3 to 5 years

1. THEME: BRILLIANT CULTURE AND HERITAGE
a) PROJECT NAME: 'THE BOX' EFFECT
<p>SUMMARY OF PROJECT:</p> <p>Build on the legacy potential of The Box by working with creative talent and communities to encourage new audiences to explore other heritage, leisure and arts activities in the city. Maximise the potential impact of Mayflower 400 as a means of solidifying Plymouth's reputation as a cultural destination by: Supporting initiatives that seamlessly connect the Mayflower thematics to the ambitions for a National Marine Park (for example iMayflower and Fab City). Building on initiatives that use arts and culture to create a sustained annual/biennial programme of culture for residents and visitors (for example British Art Show, Plymouth Art Weekender, contemporary art festival).</p>
<p>PROJECT RATIONALE/OBJECTIVES:</p> <p>Links to strategic ambition 3: We will be known internationally for jaw dropping art, authentic cultural experiences and our urban spirit</p> <ul style="list-style-type: none"> • Make more of our heritage and culture through improved presentation in The Box and city cultural organisations • Increase number of visitors to the city • Extend dwell time • Target new audiences • Animate public spaces in the city to provide points of interest • Engage with local community through outreach programmes and educational opportunities • Develop bookable visitor experiences <p>The Box is one of the single largest investments in the city, becoming 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 with growing impact and significance both nationally and internationally.</p>
<p>KEY LOCATIONS:</p> <p>City wide but particularly focusing on the 'cultural quarter' of the city including The Box, the Arts Institute, Plymouth College of Art, University of Plymouth, Drakes Leisure, Plymouth Arts Cinema</p>
<p>APPROACH:</p> <p>TBC with Box/Plymouth Culture</p>
<p>PARTNERS:</p> <p>RIO, The Box, Plymouth College of Art, Plymouth University, Plymouth Culture, Karst - Plus others</p>
<p>TIMESCALE:</p> <p>up to 5 years</p>

2. THEME: BRILLIANT CULTURE AND HERITAGE
b) 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.
PROJECT RATIONALE/OBJECTIVES: Links to strategic ambition 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 <ul style="list-style-type: none"> • Develop music and night time product • Attract new audiences • Provide ‘après sea’ experience • Extend dwell time and encourage overnight stays • Encourage spread of visitors across wider city locations • Engage local communities <p>Build a distinctive music offer for the city, considering both programming and venue development, to contribute to a buoyant evening and night-time economy where music is complementary to other art forms.</p> <p>New developments in the city have provided greater critical mass from a consumer perspective which needs packaging and promoting to specific target audiences to maximise the opportunities for the city for evening visitors locally and regionally. In addition, there is a parallel project at the very early stages, which has evolved from the loss of ‘The Hub’ as a music venue. Feedback from stakeholders is that grass roots music needs to be enabled to develop, grow and thrive in the city to provide a vibrant music scene supporting the evening and night-time economy as well as ambitions for a home-grown festival style music event over the long term.</p>
KEY LOCATIONS: City centre, Barbican, Royal William Yard
PARTNERS: Theatre Royal, Drakes Circus, BIDs, GWR, Plymouth Culture, Music Venue Trust
APPROACH: We will work with key city partner organisations to encourage development of the evening offer in Plymouth. Packaging multiple products where possible and working with strategic regional partners to promote Plymouth as a leading destination for nightlife and après-sea activities.
TIMESCALE: up to 5 years

3. THEME: BRILLIANT CULTURE AND HERITAGE
c) 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.
PROJECT RATIONALE/OBJECTIVES: Links to strategic ambition 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 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. <ul style="list-style-type: none"> • Attract new audiences • Increase city dwell time • Showcase creative, digital industries globally • Develop new experiences for visitors and community • Highlight importance of naval and maritime heritage juxtaposed with cutting edge marine technology • Supporting the National Marine Park in the creation of marine citizenship in Britain’s Ocean City
KEY LOCATIONS: Naval Heritage Centre, HMS Devonport, Devonport Guildhall, Market Hall,
APPROACH: <ul style="list-style-type: none"> – Partners will be encouraged to work together to explore opportunities, a narrative and a vision for how this area may function as a shared destination and visitor attraction over an extended period of time – 5 to 10 years potentially. – Funding opportunities will be explored for feasibility work to develop the concepts and support partners to acquire funding to move their respective project forwards. – Development of this area would require short, medium and long term phasing. <p>Devonport emerged as a key city location for visitor development on the back of current projects linked to the Guildhall, Market hall and Naval heritage Centre. The lead partners in these projects ‘RIO’, HM Royal Navy and National Museum of the Royal Navy are keen to develop these projects and connect them in a visitor cluster, which showcases Devonport’s significance to the City of Plymouth but also uses cutting edge creative and digital technologies to provide innovative new approaches and immersive experience.</p>
PARTNERS: National Museum of the Royal Navy, HM Royal Navy, Real Ideas Organisation (RIO), PCC – Oceansgate
TIMESCALE: 5 to 10 years

4. THEME: PREMIER DESTINATION
a) PROJECT NAME: CITY CONFERENCE CAMPUS
<p>SUMMARY OF PROJECT:</p> <p>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.</p> <p>Key ambition:</p> <p>Plymouth needs to grow its accommodation stock to enable it to benefit from more UK domestic and overseas staying visitors. Hotel development sites have been identified across the city and these need to be brought to fruition to enable the sector to grow to its full capacity. In particular, there is market failure in the 4-star accommodation sector and this is a key area to address.</p>
<p>PROJECT RATIONALE/OBJECTIVES:</p> <p>Links to strategic ambition numbers 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</p> <p>Plymouth currently has limited capacity to provide a conferencing offer for events, meetings and activities of over 300 people within the city. The current 4 star accommodation capacity is limited and running at around 80% capacity annually restricting opportunities to grow this areas of the market.</p> <ul style="list-style-type: none"> – Increased capacity in accommodation sector – Opportunity to market to conference and meetings sector and grow off peak/improve productivity – 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 – Supporting the National Marine Park with the positioning of marine and maritime as valuable economic drivers
<p>KEY LOCATIONS:</p> <p>City centre, Hoe, Millbay, Derriford</p>
<p>APPROACH:</p> <ul style="list-style-type: none"> – Key partners to explore feasibility of regional city centre conference, meetings and education campus. – Project to be funded via Future High Streets Fund bid. Bid to be submitted June 2020. <p>A hotel demand study was undertaken in 2014 and repeated in 2019, which demonstrates demand in the market for hotels. Operators continue to express an interest in the city and strategic sites have been allocated, however, developers are slow to come forwards. Plymouth City Council is leading this process and has had success with three star hotels with two in the pipeline to be completed by 2021 however there is a big gap in the provision of 4-star rated accommodation, which the business and international traveller demands. During consultation with partner organisations across the city it was highlighted that Plymouth lacks the high quality city centre conference, meetings, business and education facility that a key regional city requires. In particular, the city is not able to facilitate conferences currently of more than 300 delegates and this is a significant disadvantage over neighbouring destinations including Torbay and Exeter.</p> <p>Crucial to any facility of this nature will be flexibility of use for not just meetings and conferencing but also for possible smaller indoor events and activities as well as exhibitions and training. Rapid digital and even 5G connectivity will also be a key factor for a facility such as this. Currently growth in the staying visitor market is relatively static. Between 2013 and 2014, the city lost over 200 hotel beds, which has affected staying visitor nights, and spend. Every 100 beds built will increase staying nights by 29,200 and visitor spend by approximately £4.65 million annually.</p>
<p>PARTNERS:</p> <p>Urban splash, Plymouth University, Plymouth City Council</p>
<p>TIMESCALE: 0 to 5 years</p>

5. THEME: PREMIER DESTINATION
b) PROJECT NAME: BRUNEL PLAZA (at Plymouth Railway Station)
<p>SUMMARY OF PROJECT:</p> <p>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.</p>
<p>PROJECT RATIONALE/OBJECTIVES:</p> <p>Links to strategic ambition numbers 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</p> <p>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:</p> <ul style="list-style-type: none"> – Improved experience for passengers including parking, public transport and information provision – Increased capacity at peak times – Increased dwell time and spend – Opportunities for Britain’s Ocean City and National Marine Park branding and improved visitor perception on arrival
<p>KEY LOCATIONS:</p> <p>Plymouth railway station campus and Intercity House</p>
<p>APPROACH:</p> <ul style="list-style-type: none"> – Feasibility, vision and plan developed for the site – Initial funding has been secured – Further funding is being bid for <p>As part of the Visitor Plan development process, many stakeholders cited the poor quality of the railway station as a key gateway to the city as something that required a step change and strategic intervention. In fact, the railway station was the single biggest intervention that organisations felt required change. First impressions, signage, improved parking, ‘Instagram’ opportunities and connectivity to major international hubs e.g. Exeter, Newquay, Bristol and London airports were all cited as extremely important to the growth and development of the city as a major destination.</p>
<p>PARTNERS:</p> <p>Plymouth University, Plymouth City Council, Great Western Railway, Network Rail</p>
<p>TIMESCALE:</p> <p>0 to 5 years</p>

6. THEME: PREMIER DESTINATION
c) 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
PROJECT RATIONALE/OBJECTIVES: Links to strategic ambition numbers 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 <ul style="list-style-type: none"> – Increased capacity for cruise ships – Opportunity to grow the cruise market particularly for specialist embarkations/small vessels and superyachts sub 150m – Increased day 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 – Opportunity for the National Marine Park to strengthen the offer for cruise operators
KEY LOCATIONS: Millbay port/Trinity pier
APPROACH: <ul style="list-style-type: none"> – AB Ports considering re-developing existing terminal with Brittany Ferries – Progress discussions with ABP/PCC and wider city stakeholders to extend works to Trinity Pier and explore opportunities linked to more cruise/superyachts – Assemble additional funding to develop project <p>AB Ports are currently exploring the options to develop the port to improve traffic, passenger and ship access for the long term. Working with Destination Plymouth has been very successful in marketing the city as a cruise destination and the ambition is to have at least 30 ships calling annually in the long term. There are opportunities alongside for vessels up to 210m and 150m on Trinity Pier berth.</p>
PARTNERS: Plymouth City Council, AB Ports, Brittany Ferries
TIMESCALE: 0 to 5 years

6. 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

Within each priority area are a number of key activities, which need to be undertaken to enable us to successfully meet our destination ambitions. Each activity is set out in more detail in the activity plan tables under section 13 of this plan.

1. Partnership:

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

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
Department of Culture, media and sport
UK Inbound
South West Tourism Alliance

Cruise Britain
Tourism Alliance and Tourism Council
Heart of the South West LEP
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.

Partnership working is crucial across not just the whole city but also the wider region and nationally to gather the support and combine the resources of as many partners and organisations as possible to help deliver the plan. Destination Plymouth, Plymouth City Council, the two city Business Improvement Districts and our network of key city partners are crucial in enabling this to happen. Public sector funding and support is fundamental to help pump prime activity enabling leverage from grant funding opportunities and private sector. Currently staff from Destination Plymouth and the City Council work closely together with the teams from the City Centre Company and Waterfront partnership. Although the two BIDS have, a very specific place based remit it is in theirs and everyone’s interest that Plymouth as a growing city destination is successful. Key aspects of this business plan that the BIDS and city partners benefit from include:

- Major events and cultural activities
- Visitor marketing activity including digital, international, cruise and PR
- Animation and interpretation of the city through cross city projects
- Visitor information services
- Development of meetings and conferencing business
- Raising the profile and positioning the city as a great place to live, work, study and visit
- Attracting visitors and spend to the city supporting economic growth and jobs

It is reasonable therefore, that partners should contribute financially or ‘in kind’ through either delivering or specifically funding key areas of activity to help maximise the benefits for the whole city. The amalgamation and alignment of resources can amplify activities, reduce duplication and lead to greater efficiencies, while providing a single focus for delivery. Working in partnership also allows key partners to share best practice, knowledge and resources to support key city ambitions together.

2. People:

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

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 aims 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

To support 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 these include:

- 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 in 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 5,424	Indirect 1,673	Induced 888	Total 7,985
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Full time equivalent employment (FTE's)

Direct 3,726	Indirect 1,468	Induced 779	Total 5,972
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Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	707	18	724
Retailing	206	524	730
Catering	443	869	1,312
Attractions/entertainment	279	286	565
Transport	84	74	158
Arising from non trip spend	236	0	236
Total Direct	1,955	1,771	3,726

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 1000 jobs in the city bringing employment in tourism to just under 9000 jobs**. Our vision for skills and employment will be supported by a three year rolling action plan to support growth and development of skills and employment in the sector and support jobs. The skills and employment plan has been written by key city partners including University of Plymouth, City College, 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: our ambition is 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 1000 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

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

Better access for customers, better access to websites and digital information and better access to attractions. 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. DMO’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.

Accessible tourism is growing with one in 5 people in the UK having an impairment. Destination Plymouth can provide access and signposting to industry toolkits for local businesses, which provide best practice and guidance along with basic information such as ‘purple book’ health and safety guidance. Auditing within destinations can also play a key role providing insights and guidance.

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 a recognised partner, which will provide a service from basic advice to a full rating scheme and advice on how to make your business as accessible as possible. Accreditation schemes give recognition and visibility for businesses and help them to stand out to consumers in a crowded marketplace.

Business support and product development

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

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

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

Sustainability and green tourism

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

By being sustainable, tourism businesses can reduce their carbon footprint, improve their customer experience, support the local economy and stand out from their competitors. We are committed to a low carbon future and finding new ways for our industry 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. We will encourage our members to actively introduce guests or consumers to genuine experiences, both in the great outdoors and those involving arts, craft and culture in line with our strategic themes.

Plymouth already has a city wide ‘Plan for plastic’ 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 plastic’ 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 to 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 the ‘Green Tourism’ accreditation scheme, which promotes greener ways for businesses and organisations to operate, by offering our members advice on:

- Reducing energy use
- Saving water
- Efficient & eco-friendly waste disposal
- Ethical buying
- Staying local & seasonal
- Minimising food miles
- Promoting biodiversity
- Adopting a smart, sustainable outlook from top to bottom

Key actions to support 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

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 service such as attractions, museums, retail, green spaces and participate in events which benefits health, wellbeing and promotes pride

Within our ‘Star Projects’ we have multiple opportunities to engage with our local community through research, volunteering, acting as Ambassadors, guides and more to support our key themes of ‘Blue-green city’ and ‘Brilliant Culture’. Key activities in this area of work will include embedding community opportunities into projects, building on existing initiatives including Mayflower Makers to **develop longer term Ambassadors** and working closely with other partners including ‘The Box’ and National Marine Aquarium to engage local residents through ongoing programmes or annual events for example English Tourism Week or **residents open days**.

2.3 Our team

Our partnership is vital in helping us to succeed in our aims and importantly it is our people who will lead the way with a ‘**team Plymouth**’ approach. Encouraging joint working, sharing best practice and embracing the shared narrative of our city. We will work hard to be inclusive wherever is possible encouraging everyone to work towards access for all, eliminate discrimination, advance equality of opportunity, foster good relations and promote understanding.

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

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

Key actions to support local communities and our team:

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

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

We have prioritised three star projects to support our ambitions in this area:

- Brunel Plaza
- City Centre Conference Campus
- Plymouth cruise and ferry terminal

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 southwest 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 city council transport team to encourage both locals and visitors alike to walk or cycle around the city to reduce our carbon footprint.

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 re-development of the city's railway station will provide an exciting modern gateway to the city with improved parking, better connectivity to public transport and a strong visual introduction to the city as visitors to the city step off the train and enter the heart of the city 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.

Key actions to support transport and public realm development:

- Work with the city council and key transport partners to support the strategic 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, chance 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. Just by measuring the huge amount of information that travellers have left around the internet about their likings, habits and preferences the sector can personalize services and adapt to the demand. In fact, many companies are already taking advantage of ‘Big Data’ in the tourism industry to provide bespoke approaches to visitor experiences and enable more effective decision making.

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. Consider the potential in travel for automated personalization of the kind we experience on Amazon. We could have digital concierges like Siri and Alexa, but for travel or even self-driving cars. As AI and automation transform society and become ever more pervasive, we need to consider the potential benefits and pitfalls, so we can proactively address the latter. For instance, how will autonomous cars reshape transport infrastructure? What will this shift mean for the airports that rely on parking for more than 40% of their revenues? Similarly, as certain tasks are automated, how will the travel industry identify those workers in the most "at risk" jobs and ease their transition to new, quality jobs by retraining them with different skill sets? In the future there is no doubt that the tourism industry will continue to drive job creation, and that automation will precipitate a shift from data-centred tasks to more roles involving human interaction, creating unique and memorable experiences for customers.*

*Source: World Economic forum report. 04 Jun 2018 Tiffany Misrahi, Director of Policy, World Travel & Tourism Council (WTTC)

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

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.

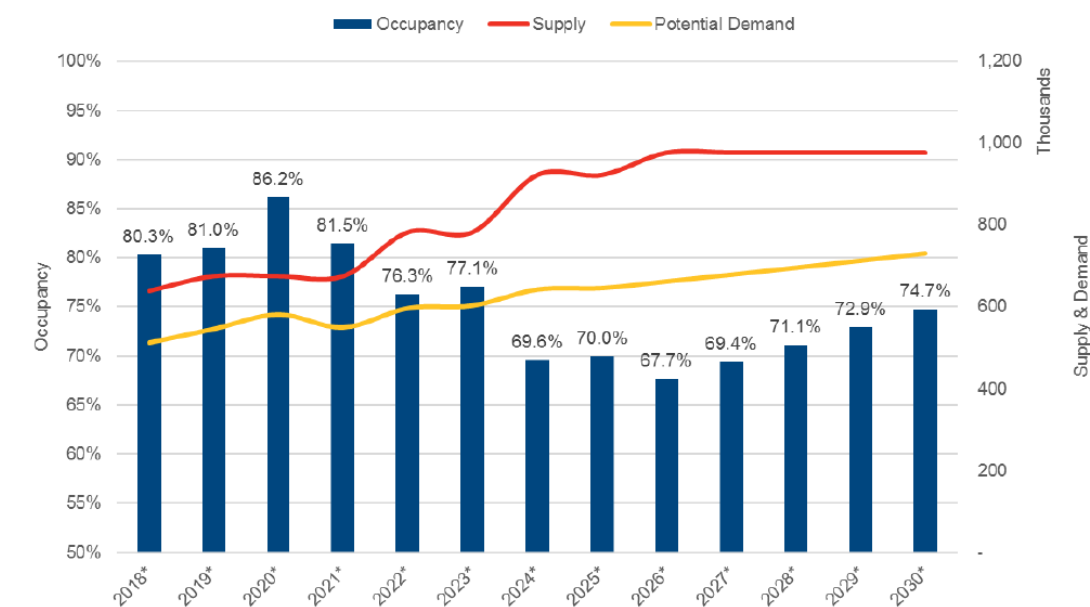
Key actions to support accommodation development include:

- 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 AirBnB

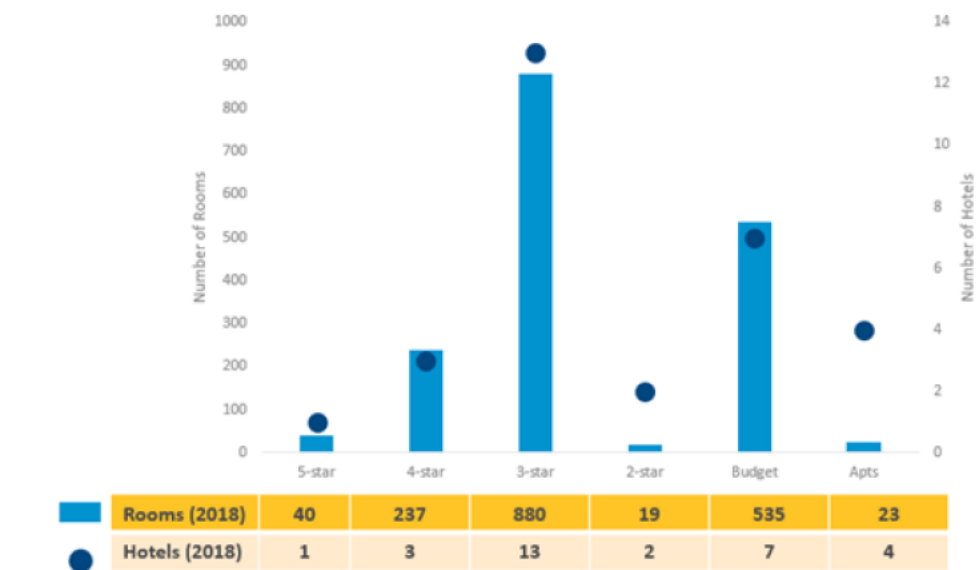
That means prioritising new hotels and conferencing facilities that create world-class quality and a distinctive offer including independent hotels and accommodation of character that become part of the Ocean City experience, for example on the waterfront or on the water. We will diversify our offer 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. Between 2013 and 2017, the Plymouth market has lost 505 rooms and there has not been any new significant supply with the exception of the 14-bedroom Rooms by Bistrot Pierre. In 2016, the market lost the 18-bedroom Plymouth Camelot Hotel and in 2013, the market lost 7 hotels with a total of 487 rooms. 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 graphic below 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.



Source: AM:PM by STR Global, Colliers International
*Colliers International Projections



Source: AM:PM by STR Global

Our ‘star project’ will provide a step change in provision and opportunities for developing our meetings, incentives, conference and events market in the city:

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.

4. Our distinctive ‘Ocean City’ brand

In the highly competitive global market of tourism, it is important to stand out and be distinctive. Yet tourism destinations are so complex, and have so many stakeholders, it can be difficult to agree and project a strong, clear positioning and sense of ‘place’. The challenge is to find propositions that are clearly different from those of competitors, are positive and appealing to priority target markets, and are also authentic and true to the reality of the offer. It helps if as many as possible of the people who develop, market and promote the offer talk about it in the same way and style.

Place branding and positioning is about:

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

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

Our shared story.....

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

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

Given the resources available and the low starting base this approach has been highly successful to date taking Plymouth from being perceived as one of the worst cities in the country to being voted by Conde Nast magazine as the 2nd best place to visit in 2020 and by New York Times as one of the top 52 places to visit globally in 2020.

Our new visitor plan provides an opportunity to build on the good work to date and to consider how we continue to grow and mature as a brand longer term.

Within this enabling priority, therefore, sit four key areas of activity, which aim to consolidate Plymouth’s position and to continue to build on our success:

- Brand positioning
- Marketing
- Events and cultural programme
- Welcome and visitor information

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.

Plymouth

Britain's Ocean City

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. Examples of this are shown below with the Mayflower 400 itineraries and cruise propositions as well as existing locally based campaign creatives. However, extensive public relations activity in key target markets has also helped to shift perceptions of the city internationally.

Immerse yourself in Plymouth

See what's on the horizon

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

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

Port Details

PORT - Plymouth Millbay Docks
Address: Port Office Millbay Docks, Plymouth, PL1 1SP
Contact: Mike Reynolds
+44 (0)1752 862191
m.reynolds@plymouth.co.uk
Millbay Docks is a short distance from Plymouth City Centre and waterfront attractions. Ideal for shore excursions.
Maximum berth length (LOA): 210 metres

Local Guides

James Corbett
www.jamescorbett.co.uk
Tel: +44 (0)1752 528070
Tel: +44 (0)1603 912066
Driver guided tours.

Jana Dymosh
besttourguide.jd@gmail.com

An Introduction to Plymouth – Britain's Ocean City

Visitors can explore this historic city with its spectacular sea views, which lies in the South West of England. It has the perfect blend of vibrant city culture, coast and countryside. It is where Sir Francis Drake, on hearing the news of the approaching Spanish Armada,

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Christmas in Plymouth

Britain's Ocean City

Enter our Christmas Competition today

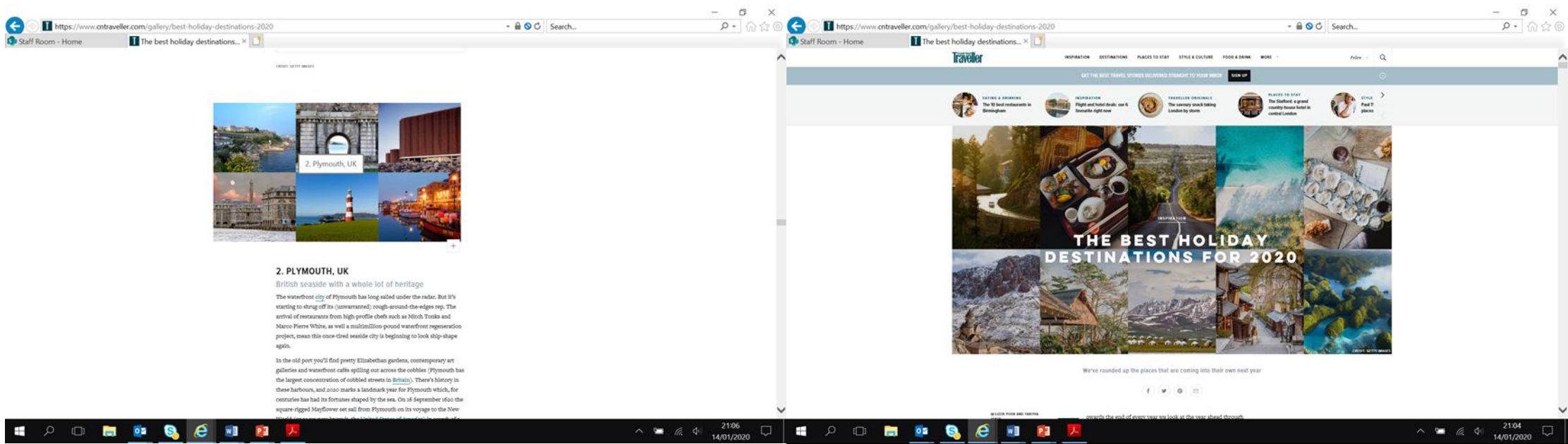
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Immerse yourself in Plymouth

Take the plunge

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

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To create successful brand positioning it is crucial that we understand what our visitors want, we relate that to our local product offer and we differentiate ourselves from the competition. The ‘Plymouth, Britain’s Ocean City’ positioning statement is designed with the intent of doing this. It reflects the strong waterfront positioning of the city and differentiates us from Southampton, Portsmouth and other coastal cities. However, Plymouth has evolved over the past 10 years since the original Visitor Plan 2020 was conceived and the challenge now is how we now ‘evolve’ the brand positioning going forwards to reflect our new visitor plan and our key themes.

Thought needs to be given as to how to use the creative to encourage people who may wish to live, work and study in the city. Our brand personality needs to be reflected in everything we do, from our visual identify to our communications, digital assets, merchandising, commercial services and most importantly in the product offer of the city and the experiences it promises. As a natural part of the evolution of the ‘Britain’s Ocean City’ brand a key part of the new marketing plan will be re-visit the creative, look, feel, content and ‘tone of voice’ for the city linked to the key themes and target audiences we wish to attract. This will also need to reflect the routes to market that we are using in particular digital and business-to-business requirements. Creative evolution will involve mapping product, targeting markets, experiences and defining creative approach and content development.

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

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**.

The key aims of this marketing plan will be:

- Focusing on the best market opportunities and return on investment
- Building on and integrating with the promotion of Plymouth as a place in which to study, invest and do business
- Recognising that Plymouth still has work to do in creating awareness of itself as a visitor destination
- Continuing to build a strong image for itself, which is consistently promoted over the long term by the tourism sector
- Acknowledging that Plymouth must attract new markets as well as consolidating and extending current markets

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:

- Grow our international visitor market by 55 %
- 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
- 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

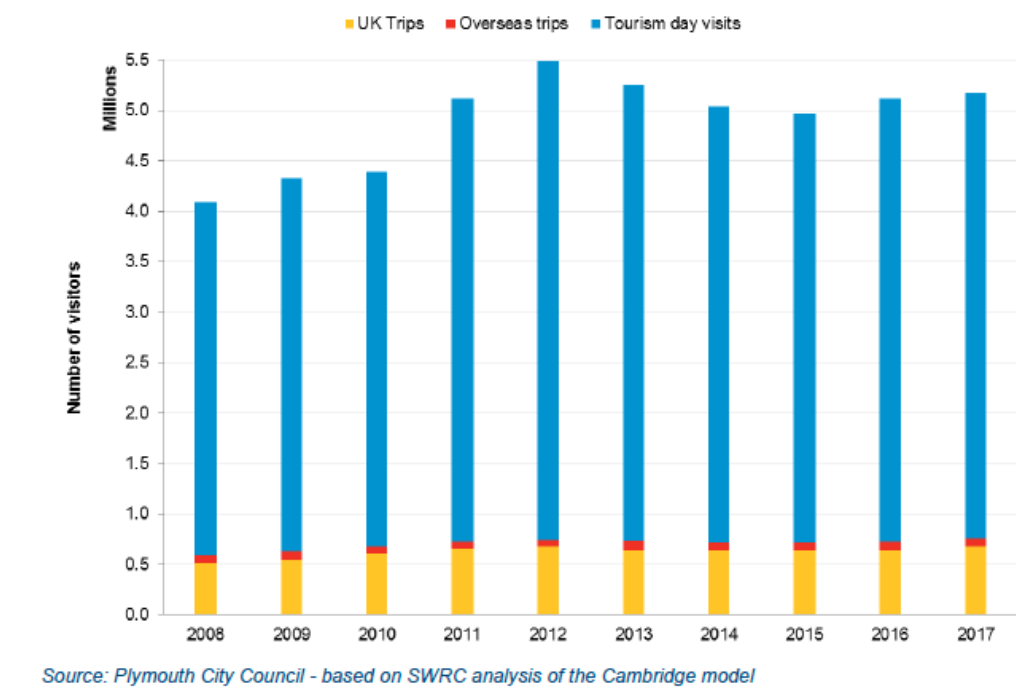
Meetings, incentives, conferences and events we will:

- 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

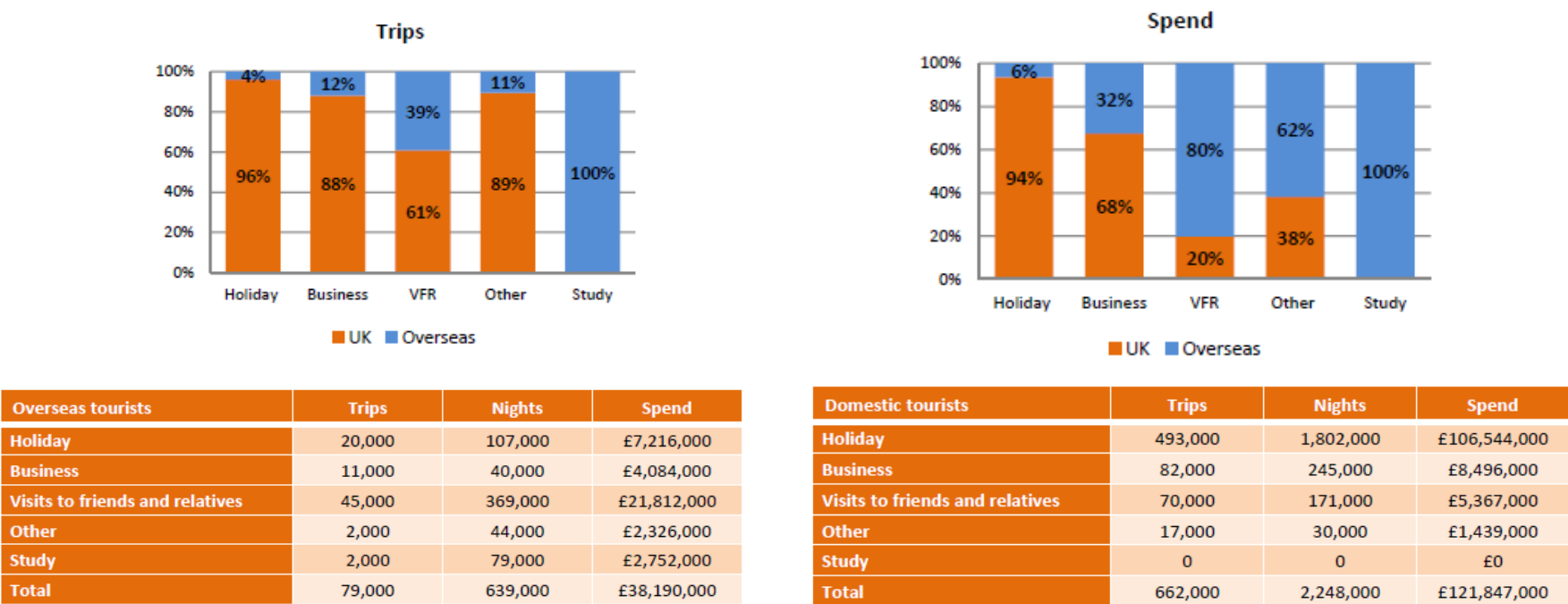
Where are we now?

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.

Tourism visitors 2008 to 2017



Staying trips by purpose



Given our current research on day, staying and international visits, we have projected forwards targets for growth up to 2030 and in particular have highlighted the following as key growth areas:

- UK staying visitors
- International staying visitors
- Business visitors (meetings, incentives, conference and events)

This growth is linked to increased capacity in the accommodation sector.

Day visitors will continue to be important; however, as they are lower spending they impact on the overall spend which in turn affects GVA and productivity. Seasonality is becoming less of an issue with staying visitors as hotel capacities are currently running at 79% on average, however, our approach is to continue to give reasons for day visitors and UK staying visitors off peak to further reduce business dependence on the main summer season and help drive productivity.

Target markets going forwards:

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

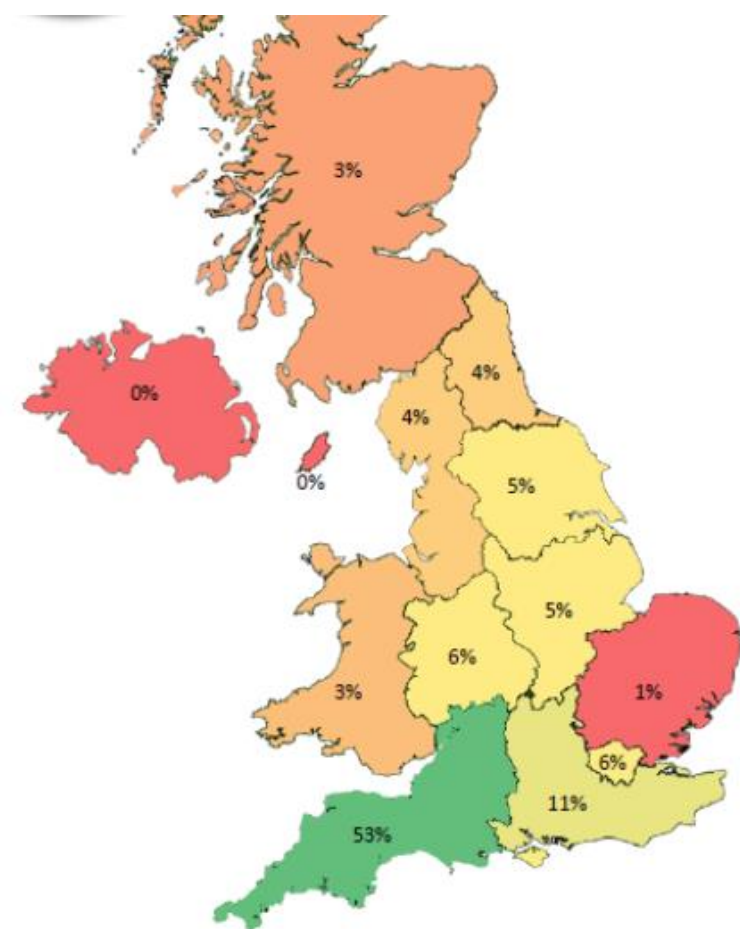
DAY TRIPS	KEY ATTRIBUTES
Resident Trippers	Day trips from home within 60 minute drive time. Span spectrum of age, economic profile and group type. Are disposed to come to Plymouth so challenge is to get them coming more often and spending more.
Entertainment Seekers	Families, day visitors from within 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. 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 fun	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
INTERNATIONAL	KEY ATTRIBUTES
USA and Canada	Lifestyle travellers - 30 - 49 yrs. old, couples & partners pre-kids & young families, not the most affluent but the most conspicuous spenders - prepared to pay for aspirational experiences. Mature experience seekers - 50 - 65+ yrs. old, predominantly empty nest couples, some retired some still working. A spread of incomes dependent on working status as well as social class. Conservative retirees - 65+ yrs. old, skewed female, retired, financially secure but lack of income means they seek good value for money.
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 above Conservative retirees – as above
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 above Lifestyle travellers – as above 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 above Conservative retirees – as above
Netherlands	Cultural adventurers: - 25 - 39 yrs. old, couples & partners pre-kids & parents with young kids, successful professionals with high disposable incomes. Lifestyle travellers – as above Mature experience seekers – as above

	Conservative retirees – as above
Spain	Young active explorers – as above Outdoor enthusiasts – as above Mature experience seekers – as above
China	Cultural adventurers: - as above Lifestyle travellers – as above
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
Vertical sectors: Marine, medical, Digital and creative	Businesses, associations, conferences, meetings and incentives events globally linked to ICCA register. Max capacity 300 delegates.
CRUISE	KEY ATTRIBUTES
Cruise operators under 210m	Smaller vessels will be targeted which will fit onto the ferry berth although larger ships are able to tender into port

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 SW region (53%) and over the summer months from visitors to Devon and Cornwall with a predominance of visitors from London and the SE (17%). We will continue to explore opportunities to position Plymouth as a ‘must do’ destination within Devon ad Cornwall for anyone who is visiting the SW region for their main holidays or short breaks.



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

Business visits accounted for 22% of all inbound visits to the UK in 2018, with 8.4 million such visits, and contributed £4.5 billion in spend. Highlights from a recent report by Visit Britain show 3.3 million visits were made to attend small and medium sized meetings (up to 20 people), while close to 1.5 million MICE visits were made to attend a large meeting (21+ people), a conference, convention or congress, an incentive or team building events, or an exhibition, event or trade show. In Devon figures show that 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 potentially a good growth areas for the city particularly linked to key vertical sectors including marine technology, medical, creative industries and manufacturing. We will create an evidence base of research 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. As a result, screen tourism is a growing phenomenon, with more and more locations across the country benefiting from a booming screen industry. The 'Quantifying film and television tourism in England' report 2015 highlights the following points in relation to the sector:

- The primary research undertaken for this project provides clear evidence that tourists will travel to sites specifically because they have been depicted in feature films and television drama.
- 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.

In 2019 as part of the iMayflower project Destination Plymouth was approached by Creative England to consider film tourism as a market opportunity linked into the Creative digital clustering, which is already established within the city. This opportunity will not only 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 across five different categories:

- Food establishments and pubs £14 (passenger £12, Crew £2)
- Retail trade establishments £43 (passenger £35, crew £8)
- Ports fees and water transportation £25 (paid by cruise lines to port authority)
- Tour operators and ancillary services £31 (passengers £30, crew £1)
- Wholesale trade establishments £15 (for ships supplies, goods, stores etc.)

The ambition is to grow cruise visits to 30 or more annually by 2030 although this may change dependant on opportunities linked to our ‘Plymouth cruise and ferry port star project. Over 40% of the cruise market is vessels under 210 m, 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 AB 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.

Routes to market:

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.

- Press and PR –get Plymouth widely talked about with a new story and 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
- Website – Plymouth continue to evolve the 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.
- 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.

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

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.

Target expenditure annually:

Marketing activity	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 – TBC
Total marketing activity	400,000	

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

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 ‘FlavourFest’, Pirate Weekend’ and Fireworks and bringing to the city major events including ‘MTV Crashes’ La Solitaire du Figaro and British Diving championships over the past few years. Alongside this, a varied annual event programme has been developed working closely with key city partners including the city council, two Business improvement 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 FlavourFest and Barbican Jazz and Blues 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 show case what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show for 2021. The aim is to have at least one transformational event a year delivering an economic impact of at least £10m and major events with a value of at least £5m 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 during 2020 with some of the key Mayflower 400 events and activities. This concept can become increasingly powerful if it is nurtured and developed with the City Council events team acting as a key facilitator and enabler for wider city partners to work with on cultural and event programming.

Key partners for developing ideas for the cultural programme will be members of Plymouth culture, Plymouth University and the 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. The role of this group will be:

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

The 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 City Centre Company and the Waterfront BID will continue to prioritise street animation and work with Destination Plymouth and the PCC 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.

Outline City Events Plan 2021 to 2023

Category	Visitor Plan Alignment	Actions
Major Events 2021: British Art Show 2022: Sail GP? 2023: Ocean Globe?	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 by 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? PFH sign off for bidding for sailing events. Align with MBC feasibility. Audit of berthing (including deep water) and technical areas.
Signature Events Fireworks Championships Armed Forces Day Music Concerts and other ticketed cultural events Half Marathon Illuminate National Diving Championships	Theme: Brilliant Culture specifically Après Sea - music and night time product, encouraging overnight stays, engaging local communities	Chair strategy planning group including Plymouth culture, Plymouth University and the College of Art, RIO, The Box, Sports? Explore opportunities for new events and prioritising on an annual basis. Signature Events sponsorship (prioritise Fireworks) off back of Mayflower. Invite to hospitality. 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. Greater support of Lonely Rock depending on how it goes 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 eg. trusted supplier list?
Civic 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 to be developed in 2020 for long term growth in the sector

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

4.4 Welcome and visitor information

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. Good destination management is a key activity to 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 City Centre Company and Waterfront Partnership 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 Visitor information centre in the Barbican as an introduction to the 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
- 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

7. DESTINATION PLYMOUTH AND PARTNERS

Destination Plymouth Limited was formally incorporated on 8th 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 the city council, Business Improvement Districts, businesses with a visitor economy interest, cultural sector and the University. 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, which proposed that the 'Head of Place Management' headed up all the partner teams, has proven challenging and not very effective and was therefore changed in 2013 bringing a Chief Executive into the leadership role. This has been very productive in many ways, however, there is still fragmentation between all the partner organisations and 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.

8. 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	Delivery Functions
<ul style="list-style-type: none">– 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	<ul style="list-style-type: none">Marketing – B2C, campaigns etc.Partnership and collaborationMedia and PR activitySkills and trainingInformation servicesSales – conference, travel trade, events, B2BIncome generationBusiness 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:

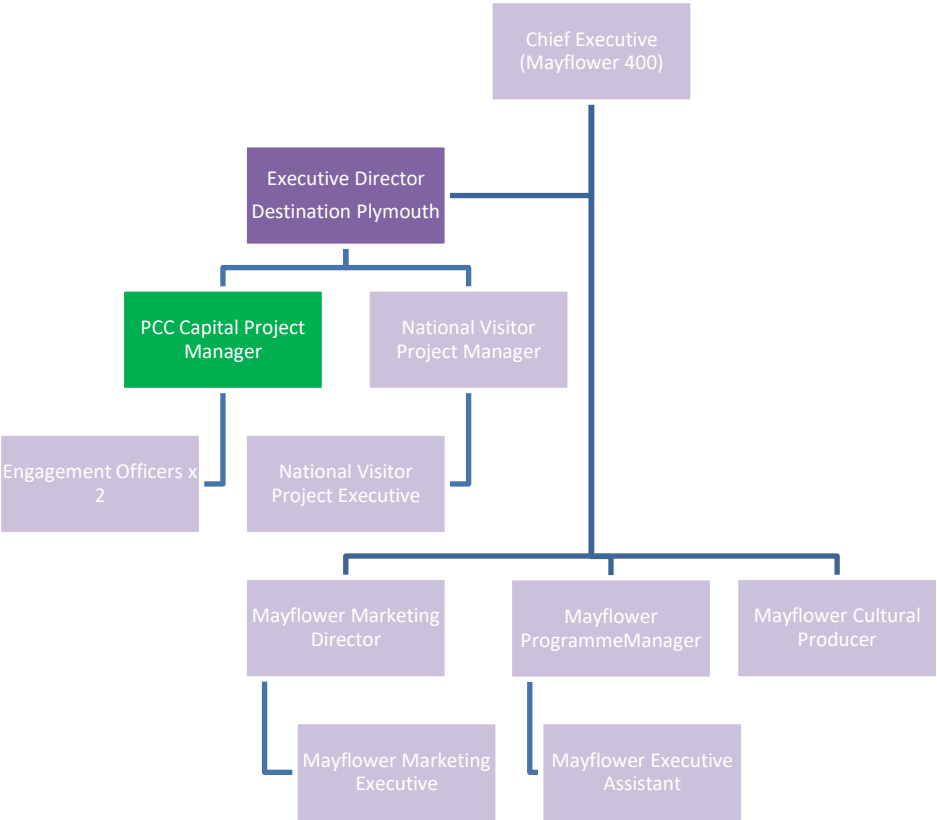
- Place welcome, animation and interpretation
- Cleanliness and safety
- Support for Conference Plymouth (PWP only)

Staff structure, roles and responsibilities

The current staff structure within each team is as follows:

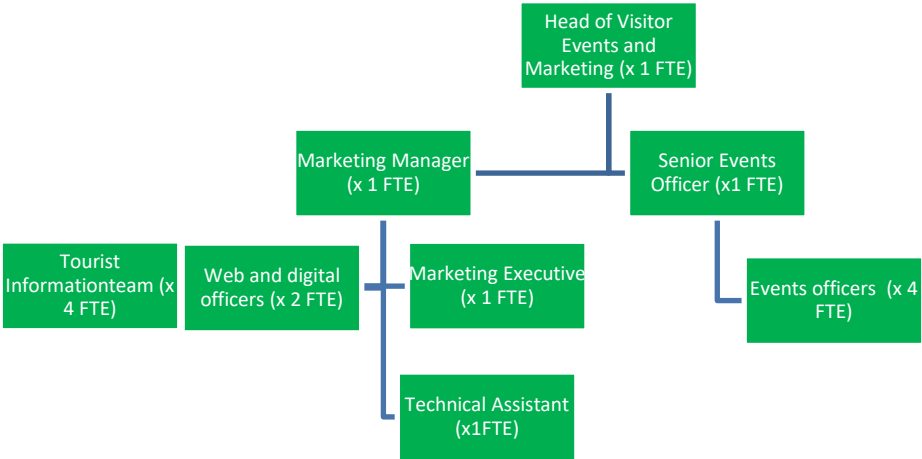
DP Ltd.

- Chief Executive (Temp post)
- Executive Director (permanent post)
- Executive Assistant (seconded from PCC)
- Programme Manager (seconded from PCC)
- Cultural Producer (MF 400/ACE funded)
- Engagement officer (MF400/NLHF funded)
- National visitor project manager (DEF funded)
- National Visitor project executive (DEF funded)
- Capital Project Manager (PCC post)
- Engagement officers x 2 (NLHF funded)



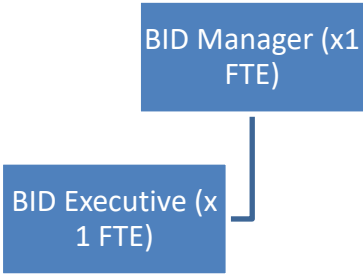
PCC marketing and events

- Head of Marketing and events
- Marketing Manager
- Events Manager (x4)
- Marketing executive
- Web/digital manager
- Web/digital executive
- Technical assistant
- Tourist information centre manager
- Tourist information advisors(x 3)



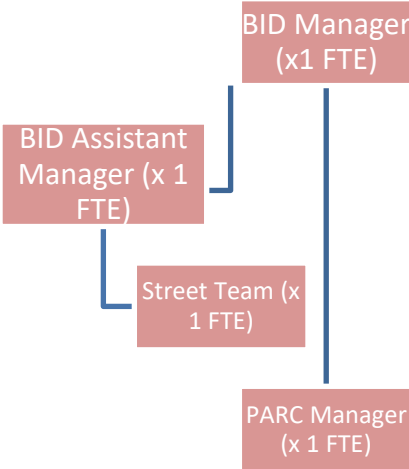
PWP BID

- BID Manager
- Assistant Manager

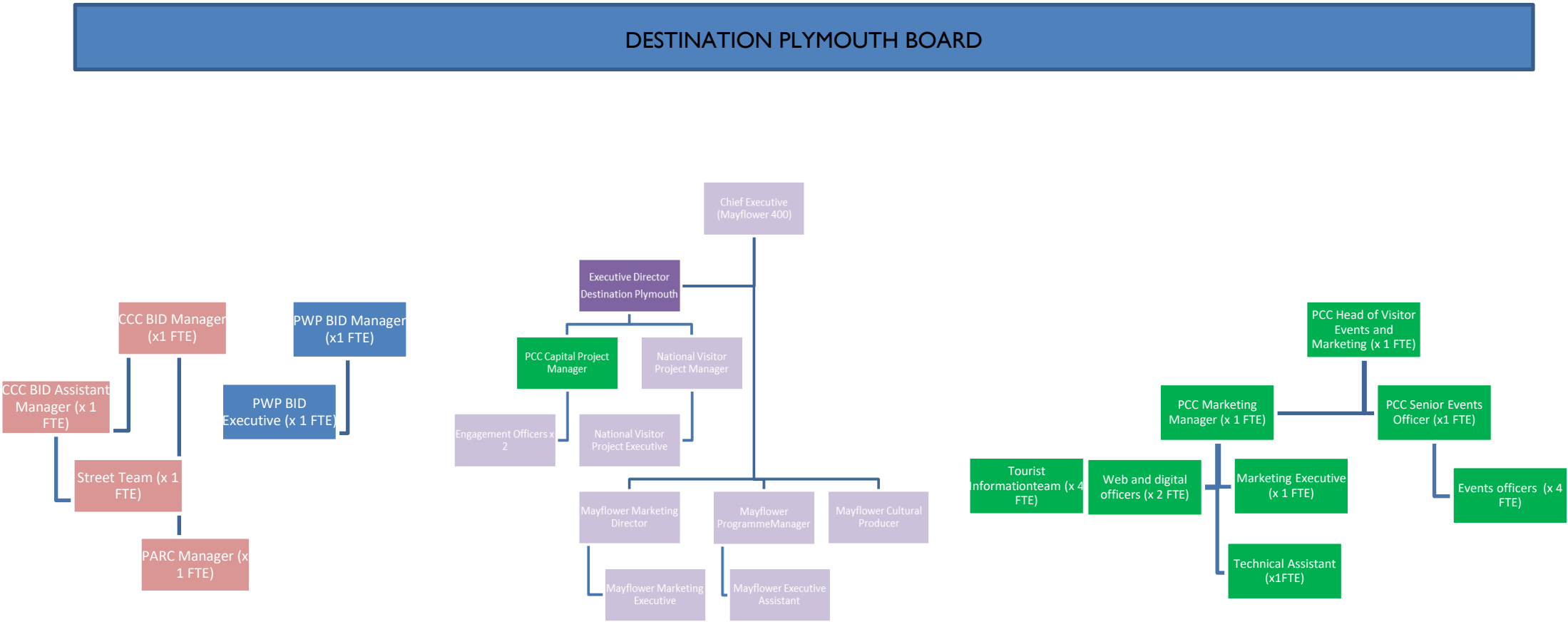


PCCC BID

- BID Manager
- Assistant Manager
- PARC Manager
- Street team x 1 FTE



When represented as a whole the structure works as follows:



9. FINANCIAL

Until 2016, Destination Plymouth as a company had a strategic remit with relatively low levels of resources and just one employee, however, since 2016, the business has been used as a delivery company for Mayflower 400 and as a result has grown in turnover and human resources significantly. In 2010 when it was incorporated, the company had an annual turnover of £150,000 approx., which was an endowment from the dissolution of the former City Development Company. 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.

i. Core funding

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

Current 2019/20 funding from key stakeholders is set out below:

Organisation	20/21
Plymouth City Council	150,000
City Centre Co.	50,000
Waterfront Partnership	10,000
University of Plymouth	50,000
Total	260,000

ii. 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 £1.46m 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. Destination Plymouth where possible will levy a percentage based management fee or funds to support programme management on all grants to cover direct costs associated with projects.

To date, excluding sponsorship and commercial income, Mayflower 400 has generated additional grant funding valued at £7.7m, which has been drawn down through strategic city partner organisations. Further income in 2020 valued at over £1m is anticipated, including the NLHF 2nd round application for the Elizabethan House and further match funding into the cultural programme.

It is worth highlighting that this represents significant leverage on City Council funding and demonstrates the power of a partnership approach across key city stakeholders.

iii. Commercial

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

- Website (www.visitplymouth.co.uk) – advertising and online shop (10% commission)
- TXGB platform (3 – 5% commission)
- Mayflower website (www.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. Much of this income has flowed in through PCC and the BIDS via street trading surplus or sponsorship of the key commercial events including Fireworks as an example. Other examples of commercial activity are provided below:

Advertising on visitor guide

The annual visitor guide generally breaks even and covers costs of print, production and distribution which costs approx. £13,800 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. Although there are businesses outside of the BID area, which can be members, many of the local tourism businesses are in the waterfront area, which means that opportunity for significant income generation is reduced. Where possible BID members are ‘sold up’ to higher-level memberships and over all this generates in the region of £10,000 per annum after costs of sales.

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. Currently approximately £3,000 per annum is generated from sponsorship, which is used directly for delivery.

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 a national sponsor of £200,000 and a high-level local sponsor at £75,000. In total £500,000 is targeted for Mayflower sponsorship and this may be explored as part of a possible funding model going forwards.

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 £10,000 per annum for three years. Total income £200,000 over three years.

Merchandising:

Destination Plymouth does not produce any merchandise directly. Partners including the Tourist Information Centre operated by PCC 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. Target revenue commission for this in the first year is only £1500.

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.

Total operational budget for Destination Plymouth in the 19/20 year is as follows:

DESTINATION PLYMOUTH LIMITED	Budget
Core income	-262,060
Core expenditure	291,107
Net overhead budget	29,047
Mayflower Projects	
Commercial/Marketing	
Total income	-220,000
Total expenditure	134,170
Elizabethan House	
Total income	-27,619
Total expenditure	27,619
ACE projects	
Total income	-35,325
Total expenditure	35,325
Net Mayflower Projects budget	-85,830
DP Projects	
Marketing	
Total income	-13,000
Total expenditure	31,500
Membership/commercial	
Total income	-26,350
Total expenditure	31,050
Cruise	
Total income	0
Total expenditure	14,524
Research	
Total income	0
Total expenditure	12,000
Net DP Projects budget	49,724
Discover England Grant	
Total income	-120,100
Total expenditure	156,425
Net Discover England Grant budget	36,325
iMayflower project	
Total income	-440,000
Total expenditure	392,270
Net iMayflower	-47,730
Total income	1,144,454
Total expenditure	1,125,990
Total budget variation	-18,464

10. GOING FORWARDS

A lot has happened since Destination Plymouth was originally set up in 2011. We have developed a new Visitor Plan and some significant Star Projects to propel the destination confidently beyond Mayflower 2020. The National Marine Park is moving forward and will bring another significant high profile project with tourism potential to the city, though the Park's remit is far wider than a visitor attraction. It is timely for the Board of Destination Plymouth to think about what type of organisation it should be in order to best serve Plymouth and what changes might be required to meet those needs.

As part of that review, it is also critical to clarify the investment and resources – staff and funding - required to meet these changes, whether the level of funding needed is likely to be raised and be sustainable and from where it might be sourced. During an away day in July 2019 the DP Board explored several different models for Destination Management Organisations (DMOs). Most models have developed over the last decade in response to changing patterns of funding and in some places around opportunities to align tourism more closely to wider economic and place objectives. The Board also looked at the range of functions undertaken by DMOs. DP does not currently fit neatly within any of these models. The model set up in Plymouth was established at a time when Plymouth was at the start of a journey to become an established destination. Plymouth's model is bespoke, designed to work with the existing structures and the marketplace in 2011. It has served Plymouth well over the last eight years and during a period of significant investment and rapid development in the city.

Destination Plymouth was originally set up with one staff member. It has been successful in securing funding and supporting projects that have grown its turnover from around £150k to about £1m per annum. The additional funding is predominantly project-related, secured to deliver specific outputs for time limited activity. However, many of these projects including Mayflower 400 (funded through Cultural Development Fund, Plymouth City Council and the Discover England Fund) are coming to an end and the funding and people resources associated with them will no longer be available to DP after 2020. While some projects may be replaced by others as opportunities arise, this cannot be assumed, and the types of activity project funding might support is not known.

Therefore, the Board needs to consider what sort of organisation it wants DP to become post-2021, how that might be resourced and to be able to articulate very clearly the role DP should have in the city going forward.

Looking at DP alongside the various models in the marketplace, several points stand out:

- DP has a very close working relationship across the range of strategic partners in the city - that is achieved through hands-on board members and a tightly defined destination geography – these are strengths to retain
- In a climate of cutbacks and reduced funding for the visitor economy, Plymouth has been growing its visitor economy and prioritising it – many of the other DMO models are the product of compromise and reduced financial circumstances, DP's model should be one that reflects the commitment to the visitor economy and the city's positive journey
- Most DMO models have a defined relationship with industry either through membership, industry members on the Board, industrywide adoption of the destination brand or/and industry focused core services e.g. research, sales and promotional services (free and paid for), conference bureau, online resources such as toolkits and training – DP needs to demonstrate stronger direct industry relationships
- DP has an industry advisory and facilitation role but does not lead for the sector in the way that a Place Marketing organisation can because of its resources and structure. Place marketing organisations don't just do marketing they are the innovation and thought leaders for the visitor economy and advise/work with big industry players
- The business plan for DP is now out of date and is project focused rather than focused around the aims and objectives of the organisation. Experience shows that many DMOs struggle to deliver their core functions and are reluctant to let go of certain activity. It is essential that functions that DP is charged to lead on are adequately resourced
- DP's functions and responsibilities are not defined that leads to some overlap and possibly some gaps in provision
- There is only one permanent staff member, all other staff are project related – that limits the capacity of DP and makes it difficult to develop and maintain core functions
- Plymouth is a high achieving city. Is DP resourced to deliver what is needed for the visitor economy?

During the Board away day in July 2019 a number of other funding models were reviewed including:

- Place marketing approach – e.g. Manchester, Liverpool
- County/city – e.g. Visit Aberdeenshire, Experience Oxfordshire
- County – e.g. Cumbria, Yorkshire
- Local authority – e.g. Brighton, Eastbourne,
- TBIDS – e.g. English Riviera, Isle of Wight
- CIC – e.g. Visit Cornwall, Visit Devon

The summary of discussions concluded that:

- Very few strategic DMOs exist without public investment. To fulfil development, destination management, research, skills and employment objectives, requires public sector partners for whom these wider objectives are part of their remit.
- DMOs entirely funded by private sector businesses are focussed on the needs and interests of the businesses, which tend to be about marketing campaigns and some business development.
- Most successful models are finding new ways of working with the industry and partners and often working across wider geographies – across authority boundaries and with new strategic partners. The political buy-in to joined up working is needed at the highest level supported by leadership within the staff team to see that through and deliver outstanding results.
- Large private sector partners when persuaded to collaborate strategically on marketing can bring significant investment to complement core funding from the public sector.

Given the above considerations it was agreed that time would be required to further explore and identify a suitable model for Destination Plymouth going forwards. As a result, a ‘holding’ position has been agreed which requires the current funding and operational model to continue for up to 18 months post Mayflower 400. This will give time for the Board and executive teams across all the partners to discuss opportunities and develop an approach, which will move the organisation forwards for the longer term.

Given the information the budget below has been adopted as a baseline to take the organisation forwards until March 2022.

Future finances

The Destination Plymouth Board will seek funding commitments based on a three-year rolling funding plan going forwards. This will be reviewed annually as part of the Boards regular monitoring processes.

Core funding will be used to lever into assembly of grant and project-funding opportunities support the following functions:

Business overhead costs:
Legal, accountancy, insurance, IT and office costs

- Executive team:
- 1 x FTE - Executive Director
 - 1 x FTE – Chief Executive
 - 1 x FTE – Project Executive

The proposed core income and expenditure budget is set out below for 2021 to 2022 only:

Overhead budget	Activity	Amount	Notes
Income	Joint financing (CCC)	50,000	Written into BID business plan
	Joint financing (PWP)	10,000	Written into BID business plan
	Joint financing (PCC)	100,000	Committed in principle
	Joint financing (University)	50,000	TBC
	Founder income	60,000	Early discussions positive
	Total income	270,000	
Expenditure	Salaries inc. NI, pensions, expenses	-255,309	
	Insurance, professional, legal	-14,625	
	Marketing, campaigns, cruise, B2B, research etc	-71,000	
	Total expenditure	-340,934	
	Net overhead budget	-70,934	

Post Mayflower 400 in 2020 all project related staff, which are not grant funded will fall away. Currently there is a grant application process for further Discover England fund project activity, which will be determined pre-April 2020. Based on the business plan assumptions, marketing plan activities revenue, and project funding will be required to support specific activities and functions post 2020.

Currently the target budget for marketing activities post 2020 is around £400,000, which covers local, trade, international, cruise and some place based marketing activity see section 9. Financial.

11. 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 City Council 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
ORGANSATIONAL		

	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 Destination Plymouth, with and supported by the City Council, 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 <ul style="list-style-type: none"> – 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, aligned with PCC checks. Ongoing, avoid need to share data with non-UK based organisations. Work closely with VB/VE 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 BOC brand Evolving the creative approach Galvanising key city partners to support activity connected to the brand	Strong BOC messaging woven into MF 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

11. 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/employment – measured by The Cambridge Model economic impact assessment
- 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, City Centre Company and Waterfront BID members as a core sample
- Strategic ambitions – we will measure progress against our strategic ambitions using all or some of the metrics above and the development of additional metrics in relation to the national marine park, low carbon and the development of conference and business tourism in the city

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. While The Cambridge Model provides some job information, it is better at showing trends than measuring actual increases in jobs, so we will also gather data from local sources working with key city partners to help us do that. We will also include questions in our business survey on employment.

The Cambridge Economic Impact Model is operated under license by TSWRC. The model utilises information from national tourism surveys and regionally/locally based data. It distributes regional activity as measured in those surveys to local areas using ‘drivers’ such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level. The model uses local data to adjust national survey data and reduce the potential impacts of small sample sizes and as a result single year data is available through this method. The model has been widely used in both the South West and across areas of England for a number of years.

The Model in its basic form relies on using information from a range of sources. The methodology and accuracy of these sources varies and therefore the estimates can only be regarded as indicative of the scale and importance of visitor activity in the local area. Thus the Model cannot take account of any leakage of expenditure in and out of the local area from tourists taking day trips in or out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas there will be an underestimate in relation to overseas day visits from holiday accommodation in London to locations receiving significant numbers from that source.

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. It should be noted that published outputs below a regional level are displayed as three-year averages due to small samples in some areas. Whilst this method provides a stable indication of domestic tourism activity over time the nature of using averages below a regional level means that any changes are softened and a particularly good or poor year’s data influences the outputs for a number of years. The yearly sample size for Plymouth from this survey is likely to be less than 100.

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. IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK although sample warnings provided with the data at this level. The yearly sample size for Plymouth from this survey since 2011 has ranged from 94 to 182.

Value of Tourism 2018
Plymouth

Key Facts	
741,000	Staying visitor trips
2,887,000	Staying visitor nights
£160,037,000	Staying visitor spend
4,679,000	Day visits
£177,918,000	Day visitor spend
£337,955,000	Direct visitor spend
£14,862,000	Other related spend
£352,817,000	TOTAL VISITOR RELATED SPEND
7,985	Estimated actual employment
5,972	FTE employment
6%	Proportion of all employment

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). Data is published at a national, regional, county and local authority level. County and local authority data is again published as three year averages due to potentially small sample sizes. The yearly sample size for Plymouth from this survey is likely to be less than 100.

The Tourism Intelligence Unit (TIU) has been established in the Office of National Statistics (ONS) and has produced a series of useful guidelines that set out what should be included in business, visitor and community surveys. We will use this information source to develop the content of our surveys (see http://www.visitengland.org/england-tourism-industry/etip/tourism_intelligence_unit.aspx).

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. The ArkLeisure segmentation classifies consumers along two axes: independent to mass market, and innovators, (looking for fresh experiences) to sustainers (seeking what they’re already used to). Adoption of the segmentation helps us to :

Inform branding, marketing and investment strategies that are most likely to:

- Encourage repeat visits among existing visitors
- Attract new visitors
- Increase the value of visitors

Gain a greater understanding of what will convert enquirers into visitors by:

- Defining who to target
- Understanding each target market’s motivations
- Selecting the most appropriate media channels to reach these market segments
- Tailoring marketing messages towards different market segments
- Increased efficiency and lower costs per-response



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.

13. ACTIVITY PLAN

ACTIVITY AREA	ACTIVITIES and milestones	ACTIVITY LEAD
GOVERNANCE AND FUNDING	Secure core funding from 2021 to 2024 Review longer term structure post 2021 Identify longer term funding opportunities	DP Board
STAR PROJECTS		
– Ocean Playground – National Marine Park	Feasibility study on Mount Batten area 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/DP
– National Marine Park Gateway	Feasibility and re-imagination of National Marine Aquarium Identify and assemble funding options	PCC/NMA
– 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
– 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	Plymouth Culture/DP
– Celebrating our maritime and military heritage	Work with NMRN and RN to vision and agree future for Naval heritage centre	PCC/NMRN/Navy/DP
– 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	Project already underway Demolish parking Refurbish intercity house	PCC/University/Network Rail
– Plymouth cruise and ferry port	Meeting with ABP and key partners to agree scope	

	Assemble funding	ABP/PCC
		y
ENABLING PRIORITIES		
Partnerships	<ul style="list-style-type: none"> – Feeding into strategies at high level regionally/nationally – Establishing and attending meetings and events/ lobbying for the sector on key issues at government/regional level – Partnership working nationally/regionally/locally – Assembling funding and resources 	DP
People		
Businesses	<p>Skills and employment:</p> <ul style="list-style-type: none"> – Identify – establish relationships with businesses, employers and training providers to identify need and training opportunities/resources for project delivery – Promote – develop the concept of a regional tourism and retail centre of excellence, raise the sector profile, within schools/community and support national 10-year campaign to recruit more employees – Recruit – Encourage businesses to recruit trainees and apprentices now for 2020 onwards/raise awareness of ‘t’ levels and apprentice levy – Retain – provide signposting for employee/employers to further training and development opportunities – Evaluate – Set targets for recruitment, training and retention and evaluate through regular monitoring and reporting <p>Product development:</p> <ul style="list-style-type: none"> – Encourage businesses to sign up to quality schemes for example ‘Green tourism’ which include auditing for accessibility and sustainability – 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 	<p>DP</p> <p>DP/ PCC environment</p>
Community and team	<ul style="list-style-type: none"> – Explore opportunities to continue ‘Mayflower Maker’ programme post 2020 and develop longer term approach to volunteering and community engagement linked to national marine park 	DP/PCC/Our Plymouth

	<ul style="list-style-type: none"> - 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 	
Ocean City Infrastructure		
Transport and public realm	<ul style="list-style-type: none"> - Work with the city council and key transport partners to support the strategic plan for the future security and sustainability of key transport routes including rail, air and sea - Support development of star projects through facilitation and cross partner working - Develop relationships with major carriers to secure a planned programme of marketing initiatives to encourage visits off peak and extend the season - Encourage carriers and tour operators to work together to take advantage of inclusive tour fares - Actively promote cycling, walking and ‘getting on the water’ through targeted campaign activity and development of new digital trails 	PCC/DP
Digital	<ul style="list-style-type: none"> - Developing a new digital strategy - Growing the reach of online and digital in line with marketing plan targets - Developing digital signposting and wayfinding solutions including exploring augmented and virtual reality - Working with key city partners to develop compelling content connected to our core themes - Ensuring our team has the specialist skills to develop compelling content and innovative approaches to digital activity - Exploring opportunities around 5G 	DP
Accommodation	<ul style="list-style-type: none"> - Produce a conference demand and feasibility study - Market Plymouth internationally for accommodation investment - Continue to benchmark accommodation supply and demand - Work with existing hotel and accommodation providers to raise quality - Lobby for improved legislation around Air BnB 	PCC/DP
Our Ocean City brand Positioning		DP

Marketing plan	<ul style="list-style-type: none">– Developing a more sophisticated creative approach for the city, building on the good work to date and positioning the city as a great place to live, work, study and visit– Mapping key products and experiences that the city can confidently lead on– Exploring new market opportunities to support the city’s growth and investment ambitions– Developing a compelling narrative to position the city internationally– Identifying opportunities for a campaign based approach into new target markets	DP
City events and cultural programme	<ul style="list-style-type: none">– Developing short term detailed delivery plan – up to 3 years– Assembling target funding and resources to deliver activity across the different target markets	DP/PCC/Plym Culture
City welcome and visitor information	<ul style="list-style-type: none">– Setting up a city wide events and cultural programming group– Auditing key city locations and agreeing what they are best used for– Promoting the city as a stage/venue through our marketing activities– Targeting specific events connected to our key themes and products <ul style="list-style-type: none">– Review existing information provision and explore future opportunities connected to digital and new technologies and passport style schemes– Re-inforce Britain’s Ocean City branding and emerging new creative concepts at all key gateways– Continue with volunteer ‘Ambassadors’ and develop guiding offer post Mayflower 400	DP/PCC