



Plymouth Visitor Plan

2020 to 2030

Destination management and business plan

Plymouth
Britain's Ocean City

Plymouth Visitor Plan 2020 to 2030



Cllr. Tudor Evans OBE

Leader of Plymouth City Council,
Director HOSWLEP

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

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

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

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

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

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

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

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

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

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Adrian Vinken OBE

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

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

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

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

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

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

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

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

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

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

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

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

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

1.0 Vision

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

"Tourism is one of the big success stories for Plymouth. Over the last decade the city has seen visitor numbers and spend grow by over 25%."

In 2011, we set out our tourism vision, approach and star projects in our first Visitor Plan. We have delivered that Plan and more. This refreshed document describes our focus and priorities for the next decade, designed to build on our progress so far and take advantage of the market opportunities.

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

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

Our strategic ambition statements:

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

*South West Tourism Research Cambridge model data 2019

Objectives and Targets

Objectives

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

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

We will focus on high value markets to drive productivity in the sector that can translate into quality, year-round jobs for Plymothians. That means international and overnight leisure and business visitors who will visit throughout the year and manifests in our targets which grow value at a faster rate than volumes of visits. Delivering our refreshed Visitor Plan will generate a further 1,000 new jobs in the city over the next 10 years.¹



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

Our targets are

- To grow visitor spend by **30% from £347 million to £450 million** in a decade
- To increase the total visitor numbers by **15% from 5.4 to 6.2 million** by 2030
- Make international tourism worth **£60 million a year spend** in the city, that's **65% growth** by 2030
- Grow UK staying visits by **25% to achieve £150 million spend**, focusing on leisure short breaks
- Make business meetings and conference tourism worth **£25 million a year** in spend to the city, a **55% increase** in a decade, using Plymouth's industry strengths to create a strong positioning



2.0 Themes: Our Blue- Green City

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

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

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

We need to do much more to deliver its visitor potential. That means delivering excellent water-based experiences and making further investments to create new vibrant quarters along the waterfront, presenting our blue and green environment as a single offer and increasing the opportunities for visitors to enjoy being by, on, in and under the water. At the same time, we need to protect and preserve our authentic natural and historic environment to ensure it remains accessible for our communities as well as visitors and future generations to enjoy. This means encouraging everyone to reduce plastic use, reduce their carbon footprint and act now to protect and preserve our ocean and our green spaces so we achieve our ambition to be one of the UK's first carbon neutral destinations by 2030.

Our strategic ambition is that 'by 2030 Plymouth will be known as the premier marine park in Europe, and the UK's first 'ocean literate city' attracting visitors from across the globe to award-winning experiences that celebrate Plymouth's

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

What does this mean for our visitors and our community?

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

Plymouth's Blue-Green Products

Blue-Green products

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



Tinside Lido



Mount Batten Watersports and Activities Centre



The Barbican and Sutton Harbour



National Marine Aquarium



Royal William Yard



The Blue Mile

2.0 Themes: Our Brilliant Culture and Heritage

Plymouth is Britain's Ocean City – the sea defines the unique history of the city and has shaped its culture, its heritage and its people over generations. Currently the cultural offer of Plymouth is not widely known or understood, however, it is now beginning to receive recognition and attract new and increased audiences. Initiatives such as Plymouth Art Weekender, Fab City, iMayflower, British Art Show and Illuminate demonstrate the innovation and leadership of the creative and cultural organisations and individuals driving cultural development within the city. This will be further enhanced by the opening of the UK's first 'immersive dome' at the Market Hall in Devonport in 2021. Further opportunities exist to showcase the city, attracting new visitors and securing its position as an international cultural destination. There exists a timely opportunity to realise the full benefit of these cultural assets and make a statement about Plymouth's cultural offer now and into the future.

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

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

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

Destination Plymouth will align its efforts with key stakeholders in the visitor, cultural and business community to ensure culture and heritage is a driving force for economic productivity and social prosperity. We will continue to use events, festivals, sport and significant celebration years to show case what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show and will open the UK's first 'immersive dome' in Devonport in 2021.

For our visitors and communities this means:

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

Plymouth's Cultural and Heritage Products

Cultural and Heritage Product:

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

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



2.0 Themes: Premier Destination

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

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

Partnerships:

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

People:

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

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

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

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

Ocean City Infrastructure:

Transport

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

We will work with partners in the South West to promote and secure radical improvements to the quality and resilience of Plymouth's road, rail, air and sea connectivity. City partners will work together to deliver innovative and sustainable transport solutions using the water. Including park and float, improved ferry and small boat services and an internationally renowned cruise and ferry terminal.

Digital

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



Boringdon Hall Hotel & Spa

Accommodation:

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

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

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

Our distinctive 'Britain's Ocean City' brand:

Our distinctive brand:

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

The messages from Plymouth should lead with the 'Britain's Ocean City' promise – it is unique to Plymouth – and the development of the National Marine Park needs to sit within this. Marketing should highlight experiences and show what visitors can do and how it makes them feel about the city. It should elevate products and experiences that are unique and that can't be found elsewhere. It should feature real people who are passionate about Plymouth, which highlight the hidden experiences, that only those 'in the know' can find. Our events and cultural activities should reflect our themes and our world-class ambitions while at the same time encouraging participation, engagement and pride within our community.

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

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

3.0 The Business Plan

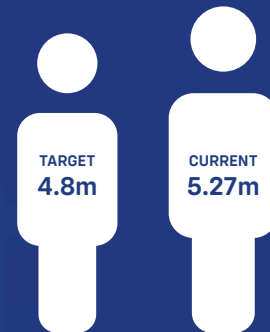
Tourism has been a great success story for Plymouth and it is anticipated that by 2020 we will have more than achieved our original 2011 goals which are set out below:

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



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

Grow GVA by **£84.4 million** by 2020



✓ 2019 Current total £334m **↑22.3%**

✓ 2019 Current total 5.27m **↑28.8%**

✓ 2019 GVA has grown by £53.2 million

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



History & Heritage



Restaurants, Pubs & bars



Night Time Offer



Retail & Shopping



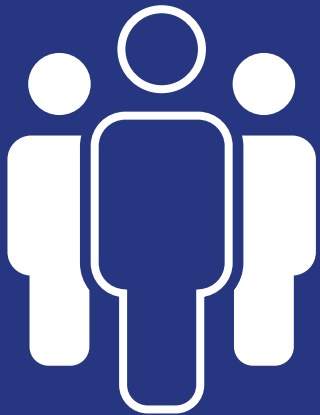
Visitor Attractions



Arts & Culture

Source: Arkenford Visitor Research 2017

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



✓ Current total 7,985 **↑10%**

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



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

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



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

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



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

✓ A major '**star project**' at Royal William yard is nearing completion with the refurbished Melville building opening in 2021

3.0 The Business Plan

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

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

Destination Development

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

Destination Management

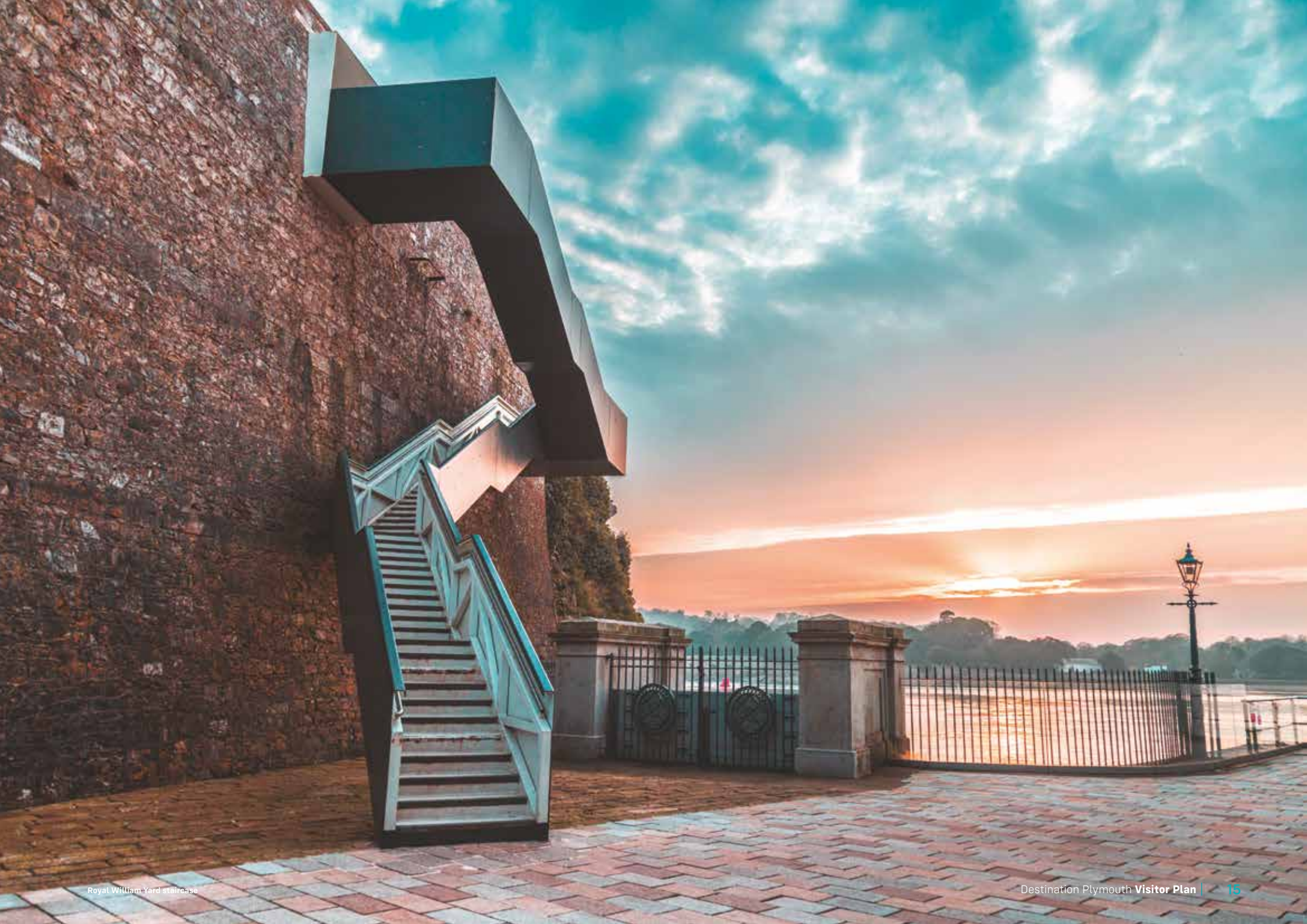
The visitor experience has always been fundamental to the success of any destination and in an increasingly digital world where information is shared instantly quality has never

been more important. Good management of the physical environment, visitor welcome, content and information provision are key functions of successful destinations. With developing digital infrastructure, 5G and emerging new creative digital technologies, sector skills development and accessibility for multiple users is increasingly a key part of ensuring the overall perception and experience is the best it can be. Our ambition is to be best in class for our digital and creative approach in everything we do and renowned as the number one must do destination in Devon and Cornwall.

Destination Marketing

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

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



Challenges and Opportunities

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

CHALLENGES

Funding

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

Governance

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

Partnerships

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

Brand

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

Investment

Product gaps

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

Events and Cultural Programming

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

Business Tourism

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

OPPORTUNITIES

Funding

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

Governance

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

Partnerships

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

Brand

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

Investment

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

Events and Cultural Programming

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

Business Tourism

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

Leisure Tourism

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

Skills and Employment

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

Digital

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

Sustainability, Green Tourism and Accessibility

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

Transport Connectivity

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

Market Intelligence

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

Leisure Tourism

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

Skills and Employment

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

Digital

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

Sustainability, green tourism and accessibility

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

Transport Connectivity

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

Market Intelligence

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

4.0 Star Projects 2020 to 2030

Delivery of our visitor plan will be focused through a series of star projects. Star projects are important because they represent the best opportunities for alignment across strategic partners as well as return on investment for the city.

During consultation with our partners, nine star projects were identified as being a priority. These projects are grouped into three key themes of:

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

THEME: BLUE-GREEN CITY **PROJECT NAME:** OCEAN PLAYGROUND

SUMMARY OF PROJECT:

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

TIMELINE: 3 to 5 years

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

This project will help support visitor plan objectives by providing:

- New and more waterfront experience based activities for visitors, day, staying and international
- Better access to the water and improved facilities
- Extended dwell time and therefore increased spend
- Delivers to the brand promise of Britain's Ocean City
- Supports theme 1 – blue-green city
- Supports the National Marine Park concept through improved access for all

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

KEY LOCATIONS:

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

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

SUMMARY OF PROJECT:

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

TIMELINE: 3 to 8 years

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

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

Objectives of this project include:

- Increasing visitor numbers
- Encourage new audiences to visit
- Provide higher levels of accessibility for all audiences through technological solutions
- Showcase the city's credentials as a cutting edge marine technology centre globally
- Engage more and connect the sea and waterfront with visitors and the local community.

KEY LOCATIONS:

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

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

SUMMARY OF PROJECT:

The National Marine Aquarium is a much loved and nationally significant visitor attraction. This project will ensure that the attraction is sustainable for the long term in its role as Ocean Conservation Trust and develop the site as a gateway to the National Marine Park. Connected projects will explore the opportunity to develop the fish market to make it more accessible for the local community as well as visitors.

TIMELINE: 3 to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambition*

1: Our National Marine Park will be recognised for amazing experiences by, on, in and under the ocean.

This project will help support visitor plan objectives by providing:

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

KEY LOCATIONS:

National Marine Aquarium,
Plymouth Fisheries,
Sutton Harbour

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

SUMMARY OF PROJECT:

Build on the legacy potential of The Box. Work with creative talent and local communities creating reasons for new audiences to explore wider heritage, leisure and arts activities in the city.

Maximise the potential impact of Mayflower 400 as a means of solidifying Plymouth's reputation as a cultural destination. Build on initiatives that use arts and culture to create a sustained annual/biennial programme of culture for residents and visitors (for example British Art Show, Plymouth Art Weekender, contemporary art festival).

TIMELINE: Up to 5 years

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

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

- Make more of our heritage and culture through improved presentation in the Box and city cultural organisations
- Increase number of visitors to the city
- Extend dwell time
- Target new audiences
- Animate public spaces in the city to provide points of interest
- Engage with local community through outreach programmes and educational opportunities
- Develop bookable visitor experiences

The Box is one of the single largest investments in the city into a heritage, cultural and museum attraction for decades at circa £40 million. During consultation with partners it came through repeatedly as something which can drive visits along with a wider community, cultural and arts agenda for the city. Further work needs to be undertaken with Plymouth Culture and The Box team to understand potential projects and future aspirations. A key short-term focal point will be the British Art Show in 2021, which will provide a significant platform for visual arts in a 'Biennale' style approach, which would be repeated every two years with growing impact and significance both nationally and internationally.

KEY LOCATIONS:

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

PARTNERS:

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



4.0 Star Projects 2020 to 2030

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

SUMMARY OF PROJECT:
Grow our evening, musical and cultural community events and assets from grass roots to larger venues to build a distinctive day and night time offer which reflects the ‘Britain’s Ocean City’ ‘Après sea’ experience and culture of the city.

TIMELINE: Up to 5 years

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

Objectives of this project include:

- Develop music and night time product
- Attract new audiences
- Provide ‘après sea’ experience
- Extend dwell time and encourage overnight stays
- Encourage spread of visitors across wider city locations
- Engage local communities

Build a distinctive music offer for the city, considering both programming and venue development, to contribute to a buoyant evening and night-time economy where music is complementary to other art forms.

KEY LOCATIONS:
City centre, Barbican, Royal William Yard

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

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

SUMMARY OF PROJECT:
An emerging opportunity to tell the story of the Navy in Plymouth working with the National Museum of the Royal Navy and celebrating our naval heritage. Develop the potential of an emerging new visitor attraction at Devonport, building on emerging plans for the Naval Heritage centre, Guildhall and Market Hall. Use the opportunity to showcase our digital innovation and creativity alongside our naval maritime heritage.

TIMELINE: 5 to 10 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambitions 3 and 5:* We will be known internationally for jaw dropping art, authentic cultural experiences and our urban spirit. We will be recognised nationally as ‘best in class’ for our digital, creative and cultural approach in everything we do.

The National Museum of the Royal Navy (NMRN) is in the process of acquiring the Naval Heritage Centre and its artefacts in Devonport situated adjacent to the Oceansgate enterprise zone and five minutes’ walk from Devonport Market Hall and Guildhall. The NMRN plans to develop this site as a regionally significant location to tell the story of the Navy/Marines and the cold war. This emerging cluster of potential visitor attractions has potential to be developed over the long term along with Mount Wise Lido and Devonport Park to encourage visitors to explore this area as part of their wider city experience.

Objectives of this project include:

- Attract new audiences
- Increase city dwell time
- Showcase creative, digital industries globally
- Develop new experiences for visitors and community
- Highlight importance of naval and maritime heritage juxtaposed with cutting edge marine technology

KEY LOCATIONS:
Naval Heritage Centre, HMS Devonport, Devonport Guildhall, Market Hall

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

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

SUMMARY OF PROJECT:

This project will aim to realise the potential of the city centre by developing a city centre conferencing campus to attract small and medium sized conferences, meetings and events to the city. Develop 4 star hotel accommodation and banqueting provision to support growth of business tourism off peak. Provide indoor facilities for meetings, events, sports and community facilities.

KEY AMBITION:

Plymouth needs to grow its accommodation stock to enable it to benefit from more UK domestic and overseas staying visitors. Hotel development sites have been identified across the city and these need to be brought to fruition to enable the sector to grow to its full capacity.

TIMELINE: 0 to 5 years

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

This project will help support visitor plan objectives by providing:

- Increased capacity in accommodation sector
- Opportunity to market to conference and meetings sector and grow off peak/improve productivity
- Converting day visitors to staying visitors will grow spend
- Perception of Plymouth as a place to do business/invest and education not just visit for leisure

Plymouth currently has limited capacity to provide a conferencing offer for events, meetings and activities of over 300 people within the city. The current 4 star accommodation capacity is limited and running at around 80% capacity annually restricting opportunities to grow this areas of the market.

KEY

LOCATIONS:
City centre, Hoe, Millbay, Derriford

PARTNERS:

Urban Splash, University of Plymouth, Plymouth City Council



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

SUMMARY OF PROJECT:

The previous visitor plan 2011 to 2020 highlighted the significance of major gateways and hubs in determining people's first impression and sense of arrival to a destination. Although work on this project has commenced it is a long-term project and will have a major impact on the visitor economy providing a significant step change in the experience and efficiency for both locals, commuters and visitors arriving in Plymouth. It will also act as a major regional gateway for thousands of passengers travelling to the South West annually and support our carbon neutral ambitions by encouraging visitors to travel by rail.

TIMELINE: 0 to 5 years

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

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

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

KEY

LOCATIONS:
Plymouth Railway Station campus and Intercity House

PARTNERS:

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



4.0 Star Projects 2020 to 2030

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

**SUMMARY
OF PROJECT:**

There has long been an ambition to improve the sense of arrival and cruise/ferry services available to passengers at Millbay port. This project will see improved capacity for traffic and transport, more streamlined border controls, better accessibility and visitor welcome service for cruise and ferry passengers off both the berth and tendering in. This project will also support our carbon neutral ambitions by encouraging visitors to travel by ferry/cruise rather than fly to the region. Higher volumes of ships will be achievable through a second smaller berth facility at Trinity Pier which will also improve the access and ambience of the waterside for visitors and local residents.

TIMELINE: 0 to 5 years

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

Objectives of this project include:

- Increased capacity for cruise ships
- Opportunity to grow the cruise market particularly for specialist embarkations/small vessels and superyachts sub 150m
- Increased day visitors to the city
- Improved port welcome and perception/branding of Plymouth as a place to do business/invest and education not just visit for leisure
- Encourage use of ferries for international visitors
- Reduce carbon footprint by bringing visitors on ferry/cruise (less than flying)
- Opportunity to extend cycling/walking route across Millbay Port to link in with national coast path

KEY LOCATIONS:

Millbay port/
Trinity Pier

PARTNERS:

Plymouth
City Council,
Associated
British Ports,
Brittany Ferries



5.0 Enabling Priorities

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

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

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

5.0 Enabling Priorities

1. Partnership

KEY ACTIONS TO SUPPORT PARTNERSHIP ACTIVITY:

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

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

Visit Britain/Visit England

Cruise Britain

Department of Culture, Media and Sport

Tourism Alliance and Tourism Council

UKInbound

Heart of the South West LEP

South West Tourism Alliance

Visit Devon/Visit Cornwall

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



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

5.0 Enabling Priorities

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

2. People

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

2.1 Our Businesses

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

This area of our work has three key activities:

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

Skills and employment

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

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

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

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

Estimated Actual Employment



Full Time Equivalent Employment (FTE's)



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

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



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

The emerging plan sets out the following vision:

VISION FOR SKILLS AND EMPLOYMENT

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

The plan has the following key objectives:

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

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

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

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

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

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

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

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

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

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

5.0 Enabling Priorities

Product development support

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

- Quality schemes and accessibility
- Business support to develop product

Quality Schemes and Accessibility

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

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

Business support and product development

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

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

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



Sustainability and green tourism

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

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

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

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

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

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

KEY ACTIONS TO SUPPORT PRODUCT DEVELOPMENT:

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



5.0 Enabling Priorities

2.2 Our community

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

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

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

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

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





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

2.3 Our team

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

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

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

KEY ACTIONS TO SUPPORT LOCAL COMMUNITIES AND OUR TEAM:

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



5.0 Enabling Priorities

3. Ocean City Infrastructure

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

Our infrastructure priorities focus on three areas:

- Transport and public realm
- Digital connectivity
- Accommodation

3.1 Transport and public realm

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

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

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

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

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

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

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

5.0 Enabling Priorities

KEY ACTIONS TO SUPPORT TRANSPORT AND PUBLIC REALM DEVELOPMENT:

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

3.2 Digital

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

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

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

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

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

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

We will need to be **creative with digital technology** to showcase the experiences that we have in the city and to enable our visitors to book joined up travel and to communicate live travel information. We will ensure visitors can find their way around Plymouth with confidence, encouraging them to explore further. We will create exciting digital interpretation and trails along the waterfront and on the water that are integral to our visitor experiences and improve the legibility of our city.

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

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

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

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

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

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



5.0 Enabling Priorities

3.3 Accommodation

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

KEY ACTIONS TO SUPPORT ACCOMMODATION DEVELOPMENT INCLUDE:

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

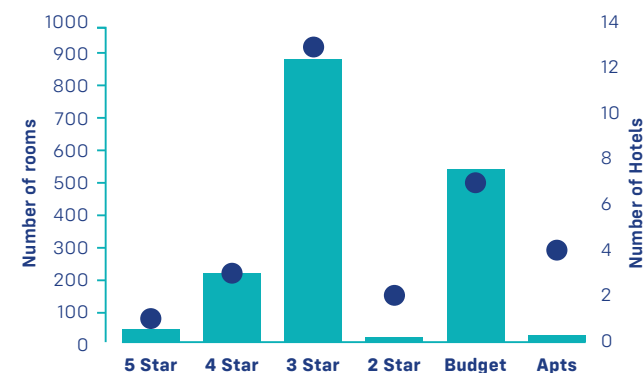
That means prioritising new hotels and conferencing facilities that create world-class quality and a distinctive offer including independent hotels and accommodation of character that become part of the Ocean City experience, for example on the waterfront or on the water. We will diversify our offer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

Our most recent hotel demand study by Colliers International demonstrates continued growth in occupancy levels (which are at 79% all year round), one of the highest of any regional city outside of London. The overall occupancy trend illustrates the strength of local hotel market conditions, also highlighting an undersupplied market. There is ongoing demand for more capacity in the serviced sector and a particular interest in accommodation development in the four and five-star categories to support business meetings, visits, conferencing and investment. The graph on this page demonstrates projected supply and demand given current pipeline activity and a snapshot of current hotel capacity by star rating.

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

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

City Conference Campus - This project will aim to realise the potential of the city centre by developing a city centre conferencing campus to attract small and medium sized conferences, meetings and events to the city. Develop supporting 4 star hotel accommodation and banqueting provision to support growth of business tourism off peak. Provide indoor facilities for meetings, events, sports and community facilities.



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

5.0 Enabling Priorities

4. Our Distinctive Brand

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

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

Place branding and positioning is about:

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

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

OUR SHARED STORY

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

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

5.0 Enabling Priorities


4.1 Brand positioning

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

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


KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

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





**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](https://www.facebook.com/WhatsOnPlymouth)  [@WhatsOnPlymouth](https://twitter.com/WhatsOnPlymouth)



5.0 Enabling Priorities

4.2 Marketing Plan

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

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

Our strategy in simple terms will be as follows:



Day visitors:

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



UK domestic market we will:

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



International market we will:

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



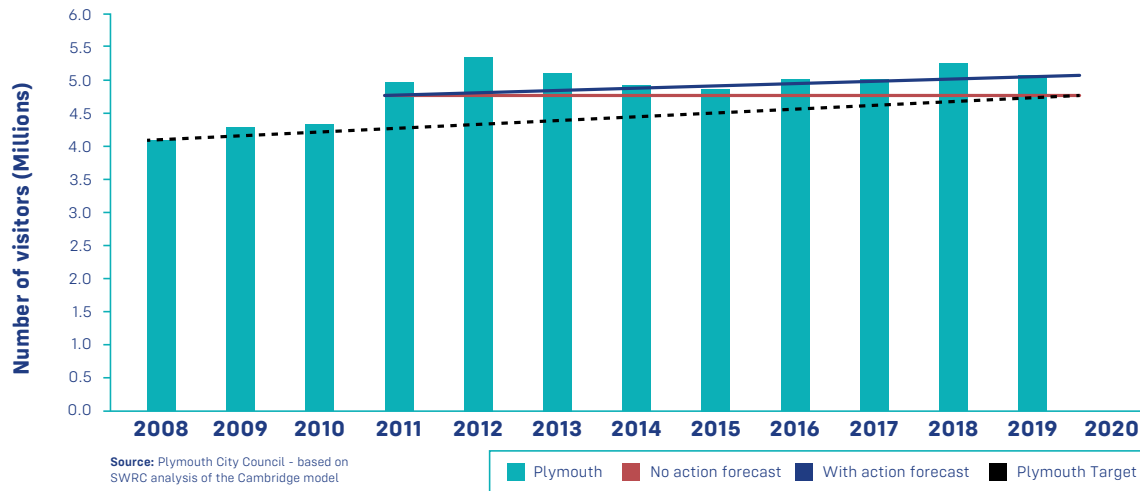
Meetings, incentives, conferences and events we will:

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

Where are we now?

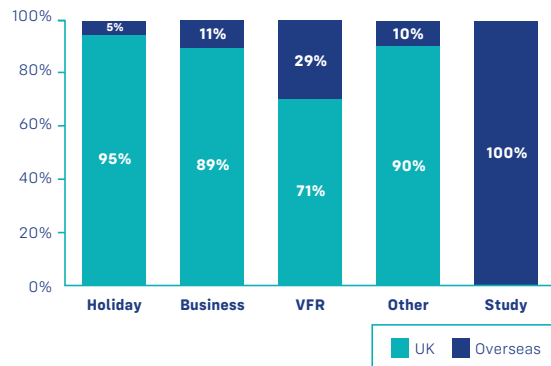
Our existing visitor base is currently 85% day visitors, 14% UK staying visitors and 1% international visitors. Currently it is estimated that around 93,000 staying visitors annually are here for business. Data does not currently exist for numbers of day visitors who may be here for business rather than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

Grow visitor numbers by 20% by 2020

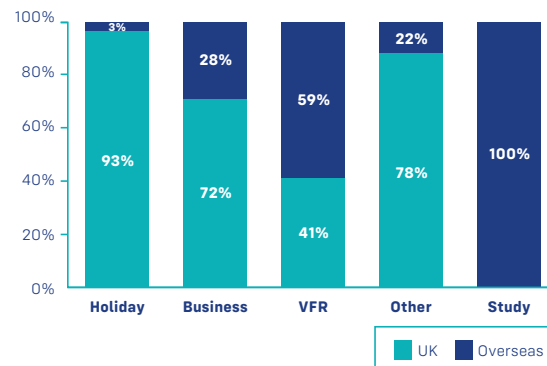


Staying trips by purpose (2019 data)

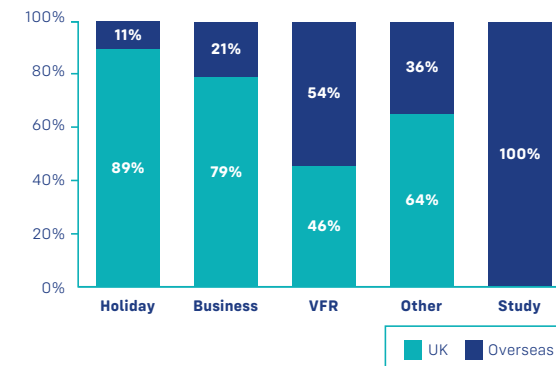
Trips



Nights



Spend



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

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

Target Markets Going Forwards

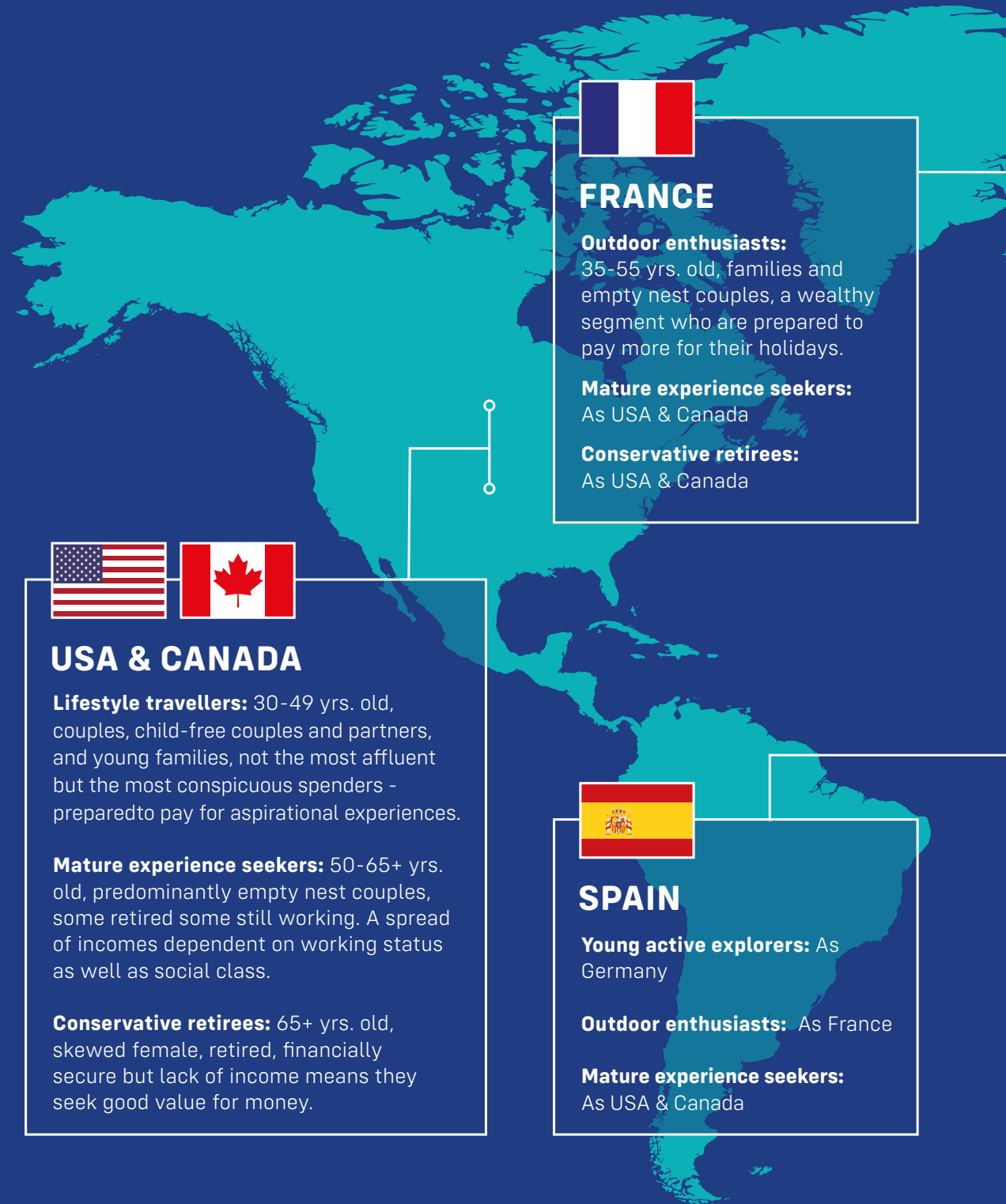
Given our current research our core targets markets going forward will be as follows:

Meetings, Conferences & Events

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

Cruise

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

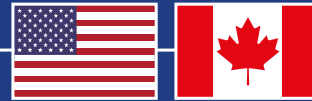


FRANCE

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

Mature experience seekers: As USA & Canada

Conservative retirees: As USA & Canada



USA & CANADA

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

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

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



SPAIN

Young active explorers: As Germany

Outdoor enthusiasts: As France

Mature experience seekers: As USA & Canada



NETHERLANDS

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

Lifestyle travellers: As USA & Canada

Mature experience seekers: As USA & Canada

Conservative retirees: As USA & Canada



GERMANY

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

Cultural adventurers: As Netherlands

Lifestyle travellers: As USA & Canada

Outdoor enthusiasts: As France

Mature experience seekers: As USA & Canada

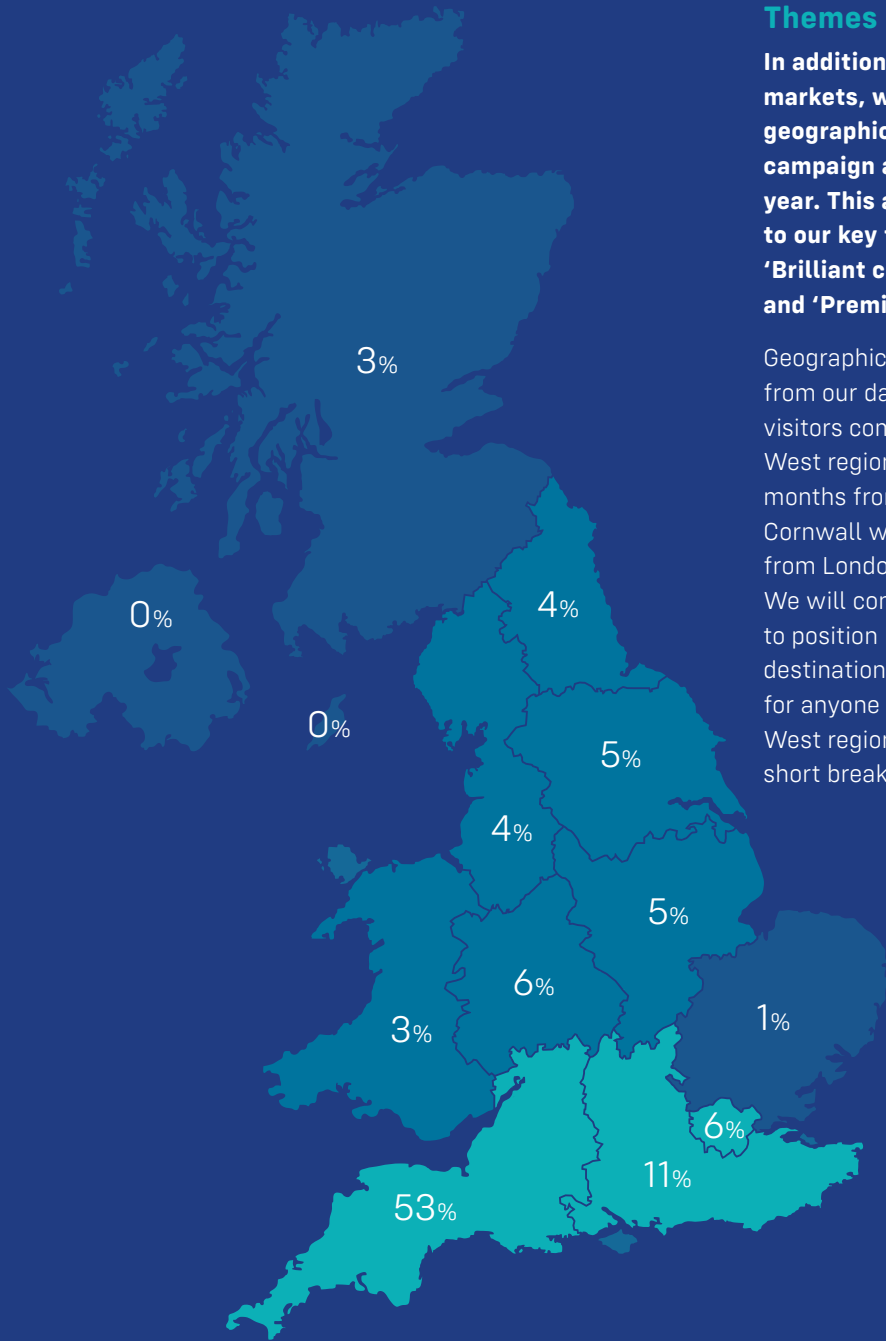
Conservative retirees: As USA & Canada



CHINA

Cultural adventurers: As Netherlands

Lifestyle travellers: As USA & Canada



Themes and Lifestyle:

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

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

Day Trips

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

UK Staying

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

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

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

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

Film tourism

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

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

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

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

Cruise market

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

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

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

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



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



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



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.



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



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

Route Market

es to rket



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

CRM

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



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



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

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

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

5.0 Enabling Priorities

Our Visitor Marketing Plan

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

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



£400,000
Target Marketing Activity

5.0 Enabling Priorities

4.3 Events and cultural programme

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

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

Currently events are classified as:

Major: one-off itinerant events with international appeal

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

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

Local: events aimed primarily at residents.

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

Going forward we will use our key themes of **'Blue-Green city'**, **'Brilliant culture and heritage'** and **'Premier destination'** to provide strategic focus for our event and cultural programme as a key part of our city's marketing and promotional activities. Our aim is that by 2030, Plymouth will be recognised internationally as a cultural destination capable of curating world-class experiences, which can be enjoyed by all. We will continue to use events, festivals, sport and significant celebration years to showcase what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show for 2021. The aim is to have at least one transformational event a year delivering an economic impact of at least £10 million and major events with a value of at least £5 million across the themes of culture, music, heritage, sports, maritime and business supported by a varied programme of cultural activities city wide.

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



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

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



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

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

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:
<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



5.0 Enabling Priorities

Outline City Events Plan 2021 to 2023

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

5.0 Enabling Priorities

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

4.4 Welcome and Visitor Information

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

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

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

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

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

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

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

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

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

6.0 Destination Plymouth and Partners

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

Strategic context:

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

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

Governance and Management

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

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

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

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

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

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

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



Aerial view of Plymouth

7.0 The Way We Work

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

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

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

STRATEGIC FUNCTIONS

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

DELIVERY FUNCTIONS

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

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

Destination Plymouth Ltd.

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

Plymouth City Council:

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

Business Improvement Districts:

- Place welcome, animation and interpretation
- Cleanliness and safety

BOARD OF DIRECTORS



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



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



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



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



Richard Stevens
Managing Director Plymouth Citybus, Director of HOSWLEP



Nigel Godefroy
Chairman Plymouth City Centre Company Ltd.

OFFICERS



Amanda Lumley
MTMI, FCIM
Executive Director Destination Plymouth Ltd.



Charles Hackett
Chief Executive Mayflower 400/ Destination Plymouth Ltd.

OBSERVERS



Tracey Lee
Chief Executive Plymouth City Council



Hannah Harris
Chief Executive Plymouth Culture



David Draffan
Service Director for Economic Development, Plymouth City Council

BUSINESS IMPROVEMENT DISTRICTS



Diane Mansell
Chief Executive Plymouth Waterfront Partnership Ltd.



Steve Hughes
Chief Executive Plymouth City Centre Company Ltd.

8.0 Financial

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

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

Core funding

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

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

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

Grant funding

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

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

Commercial

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

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

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

Advertising on visitor guide

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

Membership

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

Sponsorship

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

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

Mayflower sponsorship:

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

Founders club:

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

Merchandising:

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

In kind:

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

9.0 Risk assessments

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

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

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

Abbreviations:

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

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

Abbreviations

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



10.0 Key performance indicators

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

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

Cambridge Model

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

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

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

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

Visitor perception studies

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

Digital metrics

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

Media

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



Section 12.0 – Activity plan

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

Abbreviations

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

Abbreviations

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Plymouth Visitor Plan

2020 to 2030

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



bluestone³⁶⁰

For their creative inspiration in our print and design

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

For facilitating the process, guiding and inspiring us

Photo credits

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

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