

# Growth and Infrastructure Overview and Scrutiny Committee



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

## Purpose of Report

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

The Visitor Plan 2030 will enable Plymouth's residents to benefit from the visitor economy, supporting quality job retention and creation; whilst also enabling Plymothians to take full advantage of the city's rich history, heritage and unique environment, by promoting opportunities for education, health and wellbeing, and pride.

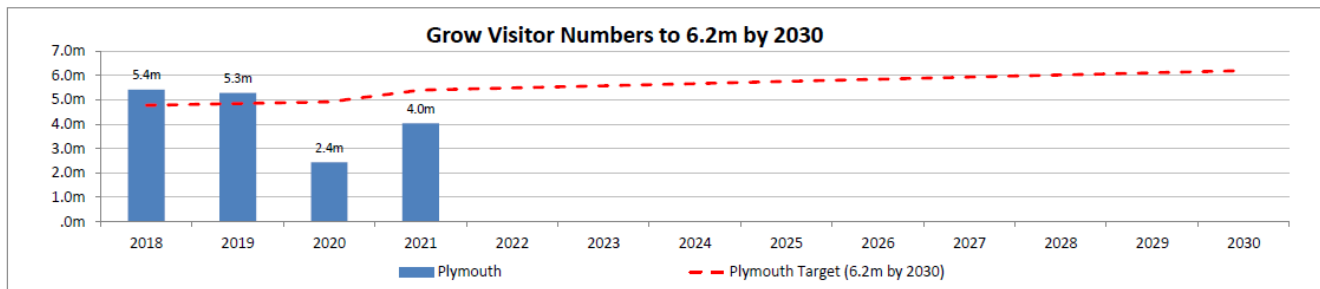
Oversight of the Visitor Plan 2030 is led by Destination Plymouth. The new plan was formally adopted in March 2020 just one week prior to the first Covid19 lockdown.

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

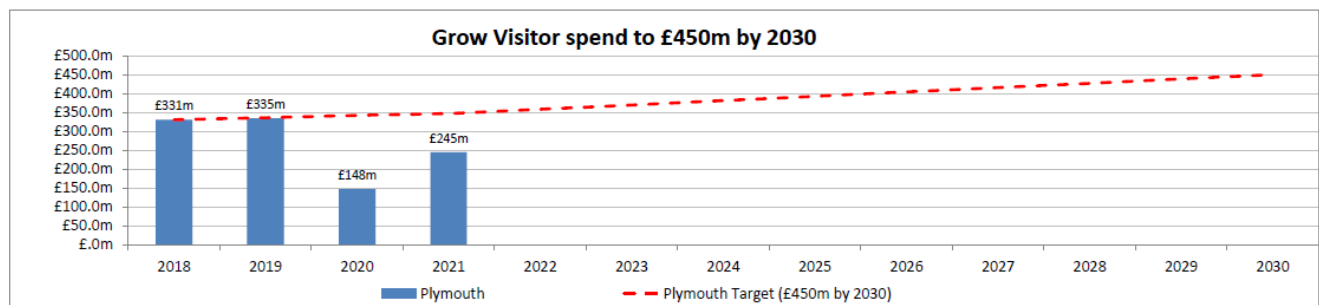
2021 Cambridge model data shows that there has been good recovery with visitor numbers growing from the Covid affected low of 2.4 million in 2020 to 4.03 million in 2021 and spend increasing from £148 million in 2020 to £244 million in 2021 which is in line with the trend nationally.

**Grow Visitor Numbers to 6.2m by 2030**

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

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

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

**Recommendations and Reasons**

That the Committee:

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

**Alternative options considered and rejected**

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

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

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

\*2019 data.

### **Relevance to the Corporate Plan and/or the Plymouth Plan**

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

### **Implications for the Medium Term Financial Plan and Resource Implications:**

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

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

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

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

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

### **Financial Risks**

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

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

**Carbon Footprint (Environmental) Implications:**

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

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

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

Notwithstanding the above, the Visitor Plan has been designed to improve Plymouth's environmental performance. The Visitor Plan's targets adopt a wise, sustainable approach to tourism growth based on the World Tourism Organisation's VICE (visitors, industry, community, and environment) model. The balance between these four elements has been considered in the production of the plan and should synergize with a view to ensure sustainability. Destination Plymouth has already started delivering a 'Green Tourism' scheme in the city from January 2022. The successful scheme includes the development and launch of the National Marine Park Experience Collection in late summer. Funding was secured from the Community Renewal Fund £137k and Climate Emergency Fund £91.2k to run this programme. So far 36 businesses have had 'Green Edge' training which is NVQ level, and over 70 people from local businesses have been trained on green tourism and low carbon. 40 businesses have signed up to the 'Green Tourism scheme' and more than 10 new products have been developed and are on the market. The current scheme funding ends March 2023.

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

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

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

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

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

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

## Appendices

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

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

Title of any background paper(s)	Exemption Paragraph Number (if applicable)						
	If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.						
	1	2	3	4	5	6	7
Brand perception report							
Visitor Plan 2030							
PR report							
Travel Trade Update November 2021 – November 2022							

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Originating Senior Leadership Team member: Anthony Payne											

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

Date agreed: 29/11/2022

Cabinet Member approval:

**Councillor Pat Patel**

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

Date approved: 29/11/2022

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

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

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

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

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

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

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

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

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

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

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

**Our city targets are:**

- **To grow visitor spend by 30% from £347 million to £450 million in a decade\***
- **To increase the total visitor numbers by 15% from 5.4 to 6.8 million by 2030\***

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

**An example of the new mission is set out below:**

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

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

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

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

ii. The Visitor Plan 2030

The strategy has three key themes:

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

And is underpinned by a series of enabling activities including:

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

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

Our objectives are grounded in **wise growth of the value of the visitor economy**. We will focus on high value markets to drive productivity in the sector that can translate into quality, year-round jobs and opportunities for Plymothians. That means international and overnight leisure and business visitors who will visit throughout the year and manifests in our targets which grow value at a faster rate than volumes of visits.

Here is the market focus for delivering that growth:



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

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

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

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

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

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

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

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

### iii. City Brand development

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

### iv. Marketing and events activity

#### – Events

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

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

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

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

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

– **General marketing activity**

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

**Visit Plymouth website, social and newsletter stats**

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

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

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

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

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

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

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

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

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

#### – PR coverage

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

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

– **Cruise marketing activity**

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

**2022 (estimated):**

Total cruise ship calls: 7

Total passengers: 3,370

Total crew: 2,411

**Total on board: 5,781**

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

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

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

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



- Conference, meetings and travel trade activity

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

#### **4.0 Factors affecting Destination Plymouth and Visitor Plan delivery:**

##### **i. Reduced capacity of Destination Plymouth executive post Mayflower 400**

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

##### **ii. DMO Review**

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

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

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

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

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

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

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

#### **iv. Skills and employment**

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

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

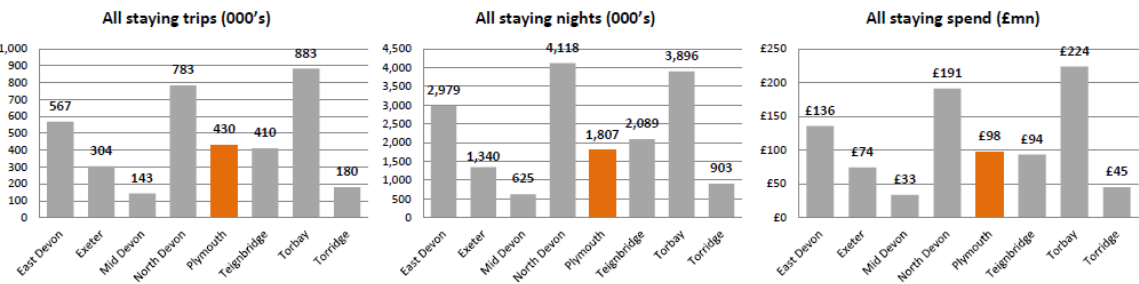
The Employment and Skills team at PCC have been exploring the challenges further along with a sector based task group and have been developing a longer-term plan over the last 6 months to try to address the issues. In the short term a funding application is to be submitted to DWP for resource as a development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

#### **v. Accommodation capacity in the city**

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

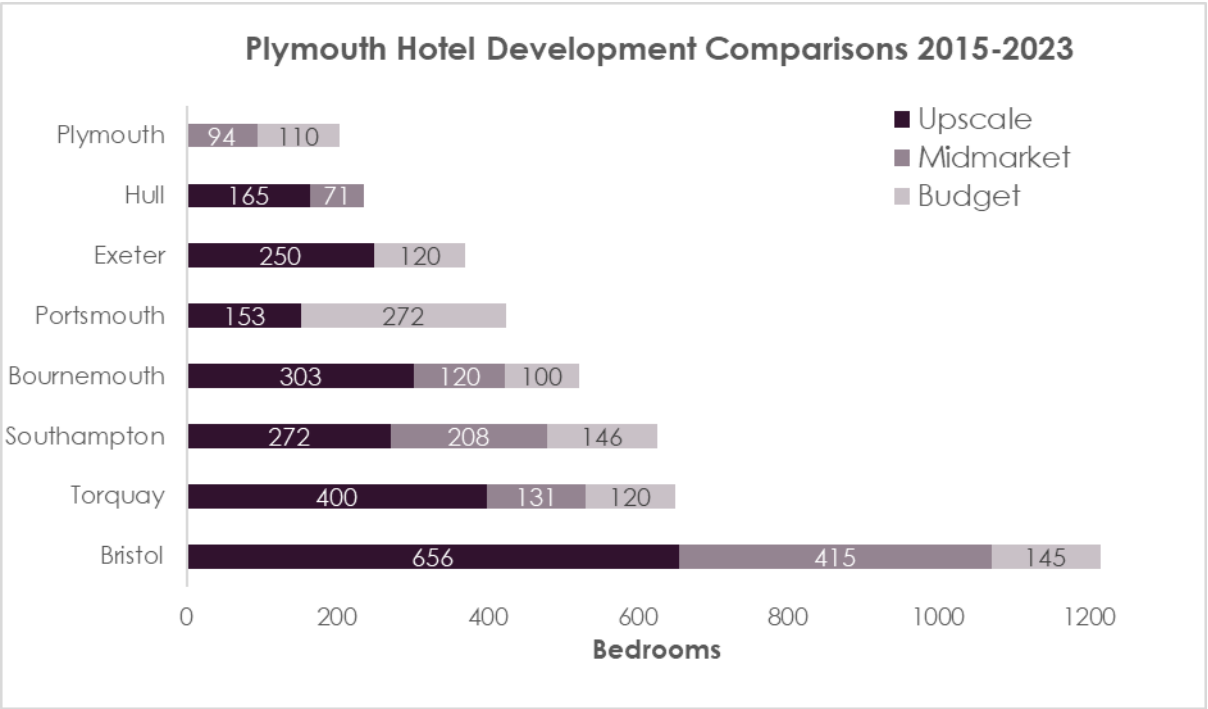
of serviced accommodation for Torbay which has over 6,000 serviced rooms compared to Plymouth at just over 2,000.

Plymouth - Staying visits in the county context



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

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



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

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

#### **vi. Energy and supply chain costs**

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