

# Growth and Infrastructure Overview and Scrutiny Committee



Date of meeting:	08 November 2023
Title of Report:	<b>Destination Plymouth progress report on Visitor economy and Visitor Plan</b>
Lead Member:	Councillor Jemima Laing (Deputy Leader, and Cabinet Member for Children's Social Care, Culture, Events and Communications)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Amanda Lumley, CEO Destination Plymouth
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Your Reference:	
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, recovery post the Covid 19 pandemic and the impact of the current economic climate. 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. In 2023 it was agreed that Destination Plymouth would extend its remit to be a broader city marketing and branding organisation. The key aim being to position the city as a place to 'live, work and visit. With this in mind work has commenced to develop a broader brand and city marketing strategy with a 10-year horizon to support this activity. This strategy will enable city businesses to align their efforts and resources behind a strong brand narrative and specific objectives in a way which has not been previously explored. The strategy is due to be completed in early Spring 2024.

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. The Covid pandemic and recent difficult economic situation has meant that post Covid recovery is slower than anticipated.

2022 Cambridge model data shows that visitor recovery post Covid 19 has started to slow. Initially growing from the Covid affected low of 2.4 million in 2020 to 4.03 million in 2021 and now 4.75 in 2022. Spend increased from £148 million in 2020 to £244 million in 2021 and £279 million 2022 which is in line with the trend nationally. This reflects the loss of tourism business capacity and also the economic factors affecting visitor spend and frequency of visits. In the current environment it is crucial that Plymouth continues to be proud of its offer and has the ability to promote it externally as widely as possible to gain competitive advantage in relation to other place destinations which are not.

## **Recommendations and Reasons**

That the Committee:

- 1) Continues to support the work of Destination Plymouth;
- 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 and moving the brand strategy forwards;
- 4) Supports the development of a city-wide brand strategy to position Plymouth as a place to 'live, work and visit.

## **Alternative options considered and rejected.**

Delivery of the Visitor Plan 2020 significantly grew the city's visitor economy, up to 2019 which represented 8,000 jobs, 7% of employment in the city\*. The 2020 plan 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. The 2030 visitor plan is now in its third year of operation and continues to set a direction of travel for the visitor economy as it recovers post Covid 19.

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.

Building on this the emerging new brand strategy will amplify the good work to date and will start to position the city as somewhere to live and work as well as visit. This will enhance the city's reputation, act as catalyst for increasing and attracting talent and provide an overall direction of travel for the city's brand messaging.

Not having the Brand strategy will affect the city's reputation through fragmented and disjointed messaging and will not maximise opportunities through partnership working on similar objectives. This in turn may impact on the city's ability to attract talent and investment for the longer term.

## 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 and emerging Brand Strategy supports the city council's ambition to make Plymouth a fairer, greener city where everyone does their bit, making Plymouth a great place to grow-up and grow old, whilst minimising the impact of the cost-of-living crisis.

In particular the Visitor plan and Brand strategy support one of the six priorities - green investment, jobs, skills and better education. Through supporting the attraction and retention of talent and investment in an environmentally and commercially sustainable way.

The Scrutiny review approach embeds the values of democracy, responsibility, fairness and co-operation.

## 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.

There is currently no provision for Destination Plymouth in revenue budgets going forwards which will leave a funding gap. UK Shared Prosperity Funding will support Destination Plymouth until March 2025. A longer-term strategy is being explored over the next 12 months to consider the future funding options.

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 four 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 £132k for delivery of a 'Green Tourism' scheme from the Community Recovery Fund. In addition, Destination Plymouth is acting as 'lead body' for a £500k 'Data hub' project for Heart of the South West LEP.

No further implications are anticipated for the MTF5 at this stage, resource implications are limited to member and officer time.

## Financial Risks

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

- Post 2025 funding for Destination Plymouth is not secure.
- Opportunities to secure and leverage grant and commercial funding are restrictive due to limited resources, high levels of competitiveness across the city and economic constraints in the business sector.
- City Centre Bid renewal due in 2024
- Waterfront Bid renewal due in 2025.
- National re-structuring of tourism may impact Plymouth's ability to draw down funding within the wider county context.

**Carbon Footprint (Environmental) Implications:**

Destination Plymouth Ltd. has become recently accredited to 'Bronze Standard' by the 'Green Tourism' international accreditation scheme. The team are very proud of this achievement which sets standards in line with the UN Sustainability goals.

The 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'*.

Destination Plymouth 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 started delivering a 'Green Tourism' scheme in the city from January 2022. 40 businesses have signed up to the 'Green Tourism scheme' and more than 10 new 'Green' products have been developed and are on the market. The current scheme funding ended March 2023; however, the team have continued to promote sustainability and the 'Green scheme' through our day-to-day business member relations activity.

**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. Destination Plymouth also acts as 'secretariat' to the city wide multi agency, Destination Operations group which runs a risk register to mitigate against impacts of large quantities of the general public at peak times across the city.

When the city 'Brand Strategy' is completed a risk register will be developed to sit alongside so that any risks may be mitigated. This is currently under development.

Equality and inclusion – Successful delivery of the Visitor Plan 2030 should create up to 1000 new jobs in the sector. This will provide employment for the local community across a very broad range of roles and in a very accessible way. Destination Plymouth will review projects and activities in the Visitor Plan on an individual basis to ensure that they promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not.

The Destination Plymouth Board has recently reviewed its structure and governance and is in the process of broadening this to be more diverse. This work is still in progress. Currently the Destination Board comprises:

Richard Stevens – Chair	Cllr Tudor Evans – PCC
Nigel Godefroy – City Centre Co	Lindsey Hall – RIO
Adrian Bratt – Princess Yachts	Tracey Lee – PCC
Paul Fieldsend Danks – AUP	Brigadier Mike Tanner - HMNavy

A community wide approach has been taken to the development of the emerging brand strategy to ensure that it reflects the broader nature of our local community and is reflecting the increasingly diverse nature of our local population and culture.

## Appendices

\*Add rows as required to box below

Ref.	Title of Appendix	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
		1	2	3	4	5	6	7
A	Visitor Plan 2030 and brand strategy progress							
B	Plymouth Visitor Plan 2020- 2030							
C	Britain's Ocean City Brand perception study							
D	Brand strategy development process update Sept 2023							
E	DMO review and development of local visitor economy partnership for Devon							
F	Destination Plymouth Activity Plan 2021-2023							

## Background papers:

\*Add rows as required to box below

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

Title of any background paper(s)	Exemption Paragraph Number (if applicable)
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	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.						
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>

**Sign off:**

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Originating Senior Leadership Team member: David Draffan											
Please confirm the Strategic Director(s) has agreed the report? Yes Date agreed: 31/10/2023											
Cabinet Member approval: <i>Councillor Jemima Laing approved via e-mail</i> Date approved: 26/10/2023											

## APPENDIX A.

### Visitor Plan 2030 and brand strategy progress to date.

#### 1. Overview

The last Scrutiny Committee report (7<sup>th</sup> December 2022) outlined the proposed changes to the role of Destination Plymouth Ltd. Moving from purely an organisation leading on the Visitor sector to more of a city-wide Place Marketing Agency. This was in response to a call to build on success to date and develop a broader approach to attract people to come and live and work in the city as well as visiting.

This report will therefore reflect back on the progress in relation to the Visitor Plan 2030 but will also now report back on progress in relation to developing the brand strategy for the city and taking on a broader role. The report is therefore split into those two elements.

#### 2. City branding and positioning:

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.

Destination Plymouth has therefore a new mission:

**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

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. Since then, the following work has been undertaken:

- Multi stakeholder Brand development group set up.
- Series of workshops to develop brand strategy content and themes.
- Engagement across multiple city stakeholders and communities
- High level strategy draft due end 2023

A separate presentation is attached to the background papers sharing some of the interim findings of the Brand Development Group for information.

In addition, and to start to implement some of the more priority areas of work identified by the Brand Development Group the Destination Plymouth Board has agreed to focus on three key areas of delivery in the short term:

- Brand toolkit
- City brand led web portal.
- Talent attraction campaign

Work will now commence to secure funding and resources to implement this and procure the required suppliers to support delivery. The target date for implementation is Spring 2024.



### 3. 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.

#### i. Marketing and events activity

##### Events

2023 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.

A new strategy has been established to facilitate and support an increased number of third-party events in the city, and as a result we have seen an uplift in the number of visitors attending events. In 2023 there will have been over **200 days** of live events taking place in the city attended by over **600,000 people**.

The year began with the Kings Coronation screening - which saw people travelling from all over Devon and Cornwall - and will culminate with the ever-popular Christmas Market in the City Centre, plus a new Winter Wonderland event at Central Park, complete with live music and a full ice rink. New events have included everything from the Street Food Warehouse to Dinosaurs in the Park to the return of Plymouth Pride.

Despite shouldering significant budget cuts, the PCC Events Team have maintained and developed the city's signature events including Armed Forces Day and the British Fireworks Championships and have driven enough new income to reinstate Bonfire Night as part of the Cost-of-Living Action Plan.

This year, PCC partnered with Brittany Ferries as the headline sponsor for the British Fireworks Championships and put care experienced young people at the heart of the event with the new Young People's Choice Award sponsored by Citybus. The event was attended by 100,000 visitors, was live streamed to a global audience. It delivered a direct economic impact to Plymouth of £5.2 million.

Although National Armed Forces Day was held in Falmouth, the PCC event, which included the Rehabilitation Triathlon, was a huge success. Numbers of visitors exceeded previous years and with many stating it was the best they had ever attended. The partnership with headline sponsors Babcock was maintained and new sponsorship from AECOM secured.

In addition, the Team have been working hard behind the scenes to bring back a recurring annual live music festival on the Hoe, commencing in 2024 – full details will be announced shortly.

Inclusion and accessibility remain a priority. To this end the PCC Events Inclusion and Access Group has been established with representation from different groups working and living with disabilities both visible and invisible. The purpose is to listen and gather feedback to improve the events by working together collaboratively and constructively.

In addition, the signature events will be accredited in 2024 as part of the [Attitude is Everything Live Events Charter](#), which is an industry standard designed to help build disability equality into all aspect of the events. The charter will cover many points including:

- Pre-event information and communications.
- Access-related policies such as assistance dogs, food and drink.
- Physical accessibility around the venue or event.
- Access to performances and displays such as viewing platforms/areas, and British Sign Language (BSL).
- Accessible facilities
- Accessibility for artists, volunteers and employees.
- Staff briefing and training.

Significant progress has already been made this year with the introduction of BSL interpretation for the British Fireworks Championships, and a mystery shopping scheme.

PCC is fully committed to the net zero declaration and is working hard to achieve it. Steps have already been taken to cut carbon emissions at events such as using local supplies and staffing wherever possible, including all event crew, catering staff, food and drink. The use of public transport is proactively encouraged and additional park n' ride, bus and train services are laid on specifically for the signature events. Event caterers are no longer allowed to use items such as plastic straws, cutlery, polystyrene trays, condiment sachets, tetra packs, bottled still water, coloured PET or highly coloured PET bottles. Caterers are also required to provide a reusable cup deposit scheme and accept people bringing their own refillable drinks cups. A new partnership has been established with Clean our Patch CIC whose volunteers will help educate event attendees about recycling correctly.

The Team are also working in consultation with the new national [Green Events Code](#), which is intended to establish best practice and shared targets for sustainability, understood and adopted by all stakeholders across the outdoor festival and events industry. Minimum standards, practice and targets will be set around travel and transportation, food and drink, materials and waste, energy and water. PCC signature events will operate within the Code, and a Green Action Plan will be developed for each event over the next five years.

## Marketing

### General marketing activity

2023 has been an exceptional year for event sponsorship, in particular securing and maintaining delivery across the following: Babcock International for Armed Forces Day, the Rehabilitation Triathlon - secured new sponsor Aecom, and Britany Ferries, Plymouth Citybus and Moxy hotel for the British Firework Championships. This level of sponsorship requires a high-level delivery output to maintain and grow sponsorship annually for key events.

A digital-first marketing plan has been activated in line with the Visitor Plan strategy and supporting the council's plans for sustainability reducing unnecessary and expensive print costs. In light of this we have employed a Digital Marketing Assistant into the team to fill the gap that was left when the previous assistant was promoted. The opportunity was also taken to replace a Marketing Officer role with a new Digital Marketing Officer during staff turnover. This has increased the digital knowledge within the team ensuring we can deliver a social-first approach in 2024 with lots of engaging video to add value to both campaigns and our always-on content.

A brief overview of website and social performance identifies Instagram as our largest growth channel (19.43%) which is outperforming original social channels, Facebook and X (formerly Twitter).

Considering the channel was new in the previous period this performance is above expectation, but very much in line with our social-first plans for 2024, where we intend to maximise this new and engaged audience.

In addition to destination, the marketing team also supported Plymouth Sound National Marine Park's final bid submission to the National Lottery Heritage Fund for the delivery phase.

<b>Visit Plymouth Website</b>	<b>17 Oct 2021-2022</b>	<b>17 Oct 2022-2023</b>	<b>Increase</b>
<b>Users</b>	<b>673,720</b>	<b>807,705</b>	<b>19.89%</b>
<b>New Users</b>	<b>673,332</b>	<b>788,806</b>	<b>17.15%</b>
<b>Page views</b>	<b>1,765,201</b>	<b>2,384,271</b>	<b>35.07%</b>
<b>Sessions</b>	<b>880,432</b>	<b>1,156,924</b>	<b>31.40%</b>

<b>What's On Plymouth Facebook</b>	<b>17 Oct 2021-2022</b>	<b>17 Oct 2022-2023</b>	<b>Increase</b>
<b>Posts</b>	<b>923</b>	<b>957</b>	<b>3.68%</b>
<b>Post engagements</b>	<b>92,432</b>	<b>78,360</b>	<b>-15.22%</b>
<b>Reach</b>	<b>9,079,002</b>	<b>8,905,388</b>	<b>-1.91%</b>
<b>Engagement rate</b>	<b>2.12%</b>	<b>3.34%</b>	<b>57.55%</b>
<b>Fans</b>	<b>68,263</b>	<b>69,251</b>	<b>1.45%</b>

<b>What's On Plymouth Twitter</b>	<b>17 Oct 2021-2022</b>	<b>17 Oct 2022-2023</b>	<b>Increase</b>
<b>Posts</b>	<b>767</b>	<b>807</b>	<b>5.22%</b>

<b>Post engagements</b>	<b>17,615</b>	<b>12,555</b>	<b>-28.73%</b>
<b>Impressions</b>	<b>490,772</b>	<b>480,855</b>	<b>-2.02%</b>
<b>Engagement rate</b>	<b>2.91%</b>	<b>2.39%</b>	<b>-17.87%</b>
<b>Fans</b>	<b>9,311</b>	<b>9,794</b>	<b>5.19%</b>

<b>Visit Plymouth Facebook</b>	<b>17 Oct 2021-2022</b>	<b>17 Oct 2022-2023</b>	<b>Increase</b>
<b>Posts</b>	<b>527</b>	<b>863</b>	<b>63.76%</b>
<b>Post engagements</b>	<b>17,300</b>	<b>94,440</b>	<b>445.90%</b>
<b>Reach</b>	<b>4,081,863</b>	<b>6,346,803</b>	<b>55.49%</b>
<b>Engagement rate</b>	<b>1.44%</b>	<b>2.86%</b>	<b>98.61%</b>
<b>Fans</b>	<b>14,600</b>	<b>15,699</b>	<b>7.53%</b>

<b>Visit Plymouth Twitter</b>	<b>17 Oct 2021-2022</b>	<b>17 Oct 2022-2023</b>	<b>Increase</b>
<b>Posts</b>	<b>587</b>	<b>781</b>	<b>33.05%</b>
<b>Post engagements</b>	<b>11,848</b>	<b>10,821</b>	<b>-8.67%</b>
<b>Impressions</b>	<b>326,352</b>	<b>492,166</b>	<b>50.81%</b>
<b>Engagement rate</b>	<b>2.54%</b>	<b>2.76%</b>	<b>8.66%</b>
<b>Fans</b>	<b>17,124</b>	<b>17,505</b>	<b>2.22%</b>

<b>Visit Plymouth Instagram</b>	<b>17 Oct 2021-2022</b>	<b>17 Oct 2022-2023</b>	<b>Increase</b>
<b>Posts</b>	<b>48</b>	<b>596</b>	<b>1141.67%</b>
<b>Post engagements</b>	<b>13,775</b>	<b>62,618</b>	<b>354.58%</b>
<b>Reach</b>	<b>173,452</b>	<b>897,590</b>	<b>417.49%</b>
<b>Engagement rate</b>	<b>7.74%</b>	<b>9.12%</b>	<b>17.83%</b>
<b>Fans</b>	<b>9,036</b>	<b>10,792</b>	<b>19.43%</b>

<b>Visit Plymouth Newsletter</b>	<b>17 Oct 2021-2022</b>	<b>17 Oct 2022-2023</b>	<b>Increase</b>
<b>Subscribers</b>	<b>10,191</b>	<b>10,233</b>	<b>0.41%</b>
<b>Open rate</b>	<b>29.21%</b>	<b>32.54%</b>	<b>11.40%</b>
<b>Click rate</b>	<b>2.71%</b>	<b>3.19%</b>	<b>17.71%</b>

– **PR coverage**

Numbers for 2023 include all coverage derived from the ‘Time Out’ article identifying Plymouth as one of the top 14 most underrated destinations in the world.

	<b>October 2022</b>	<b>October 2023</b>
<b>PR Audience Overall Reach</b>	<b>647,744,275</b>	<b>2,559,947,633</b>
<b>PR AVE Overall in GBP</b>	<b>£17,816,248</b>	<b>£62,127,416</b>

ii. **International and domestic trade activity**

The Destination Plymouth team has been busy over the past 12 months marketing to the domestic and international travel trade through a direct to business approach. This has included a number of key trade events which have been attended to develop leads and also maintain customer relationships for existing clients.

**Britain and Ireland’s Market Place (BIM) – Jan 23**

36 appointments in total. Great interest in Sustainability and the National Marine Park Experience Collection. With the US buyers they are still very much interested in Mayflower and Maritime Heritage. A few buyers are concerned with the lack of accommodation product in Plymouth and the “resistance” from some of our hotels to give over allocation and rates. All operators pleased with the new Moxy Hotel coming and we have passed on contact details to them to contact directly.

**Explore GB -March 23**

31 virtual meetings took place over 2 days. Met with UK, USA, German, French and Dutch buyers.

The Virtual Booth had our Travel Trade Guide and the NMP Experience Collection Travel Trade pdf.

Overall feedback was great and there was a lot of interest in the new NMP Experiences, our work towards Sustainability and also the heritage links for the city. Lots of requests for accommodation contacts and pleased to hear about the Moxy opening in July. There were a few concerns about lack of accommodation but pleased to hear about high quality hotels in the surrounding areas.

Olympia Europe, Golden Tours, AC Group, G2 Travel, Brittany Ferries (Develops driving tours), Adventure Tours UK all very keen to come on a Familiarisation Trips this year,

Britanny Ferries, looking for attractions and B&Bs in Plymouth and info on Golf. They are rebuilding their drive tours programme – new website coming. The majority of buyers are wanting more information from hotels and contacts.

**Destination Britain North America – September 2023**

We attended DBNA with Visit Britain in San Francisco. 38 appointments took place over the two-day event which included US and Canadian Tour operators and Travel Agents. This was probably one of the best events in the last 10 years with the weak £ driving a booming rise in US visits to the UK. Many of the tour operators are planning tours to the SW and Plymouth for the first time. Particular interest was still in Mayflower and Boston 400 which is 2030 as well as D-Day 80 and our heritage offering. New itineraries included Napoleon tying in with the new Napoleon film due for release in November and also Sherlock Holmes and literary connections.

**British Travel Trade Show – March 2024**

We will be attending BTTS in March 2024 with our own dedicated Plymouth stand. We are currently going out for stand partners and have confirmed bookings from Plymouth Boat Trips, Kynance Hotel and The Box with interest from St Mellion.

### **China Travel Outbound**

We hosted the editor of China National Travel Magazine in September for a full day itinerary which included Mayflower product, The Box and Royal William Yard. The visit was very positive, and we anticipate the feature will be written by the end of the year. The magazine goes to over 500,000 Chinese consumers and is state run.

### **Travel Trade Activity**

We are continuing to work on the new Travel Trade area of the visitplymouth website and add new content. In addition, we are helping members to develop new products for the Travel Trade and visiting members to talk about travel trade activities. We have been cleaning our trade database which has 1100 members. We have Created a new Travel Trade pdf for potential buyers and tour operators. This will be updated after Christmas ready for BTTS in March and joined the CTA - Coach Tourism Association.

### **iii. Conference and meetings activity**

#### **Events**

We joined the Meetings Industry Association (MIA) last year and have been attending Destination Web Seminars and Pop-Up Discussions as well as making use of the free training sessions for the team. Attended the MIA Summit in London on the 6<sup>th</sup> of October.

Visited Confex March 23 at London Excel

Meet Plymouth took a stand at The Meetings Show in June 23 with Moxy and Logan Air as stand partners. Obtained a new database of 190 new contacts. Which we have invited to the Meet Plymouth Showcase in September and will be hosting these agents on a fam trip soon.

Hosted the Meet Plymouth Showcase event on 11<sup>th</sup> Sept at The Box – 23 stands and 35 delegates attended and over 100 local businesses invited.

#### **Familiarisation Visits**

Hosted a 2-day Fam Visit for Surgeons Quarters in partnership with Loganair on the 12<sup>th</sup> June. This is creating new links with the Royal College of Surgeons and Edinburgh University.

Hosted DPT Legal in September – VB Hosted Buyer. This fam visit was a response to the invites sent out to our Meeting Show Database.

Working up a Fam Visit in partnership with St Mellion for Feb 24 – they would like to host Agitto – conference agent for a 2 day stay visiting incentive venues in Plymouth.

Will host Visit Britain BV&E team over the winter period. Trying to confirm date at present.

#### **Name change from Conference Plymouth to Meet Plymouth**

Over the summer we rebranded Conference Plymouth to Meet Plymouth to fall in line with other destinations and to help reengage members with our new 4 tier membership we launched in January. All marketing collateral, website and digital social platforms have been updated.

## Membership engagement

We host quarterly membership meetings with our partner venues and suppliers and update them on activity. 121 members meeting also take place to update venues on our activities and to remind them of the activity they can get involved in. Additional face to face meetings are held with 2-3 members a month. A new Meet Plymouth members linked group has been created to help with membership engagement.

## Enquiries/Leads 2024

Napoleonic Federation General Assembly confirmed – 3<sup>rd</sup> May 2024 – 60 delegates for a 2-night stay.

Basketball Event in June 23 – 50 delegates – Accommodation rates were sent over. Disabled access rooms required.

## iv. Cruise and marine marketing activity

The Cruise sector is one of the fastest growing segments in the UK tourism sector, with the average annual growth in passenger port calls in the UK rising by 13.5% year on year between 2014 and 2019. The trend continues, and 2023 saw the highest amount of cruise calls ever to the UK. Plymouth in 2023 has welcomed 10 cruise vessels this season, over twice as much as the 2022 season. Looking forward the Port authority have their own targets, and are hoping to achieve 20 visits in 2024, bookings are already being received for 2025 with 8 provisional and 2026.

Data shows that an average spend per passenger during a port visit is £80, this is double the average spend per non cruise visitor to the city. More importantly, data tells us that 69% of cruise passengers will return to a destination they visited on a cruise. The total passenger net spend would be estimated to be £550,000 during this season, of which the local businesses benefit from directly.

2023 has continued to build upon the post covid-19 cruise ship call numbers to Plymouth.

Plymouth's reputation as one of the friendliest, and most welcoming, ports / destinations is really growing with increasing interest from cruise operators globally. The Cruise partnership led by Destination Plymouth and comprising Plymouth Waterfront Partnership and City Centre Company BIDS, AB Ports and the Cattewater Commissioners has been incredibly supportive and continues to strengthen. The partnership funds cruise marketing activity and port welcome as well as advising and helping with business feedback market insights and intelligence.

Total number of cruise ships calls for 2023 was 10, although there were 3 cancellations due to two of the ships being retired from service (Braemar & Ocean majesty), and one itinerary change (Amadea).

### 2023 (estimated):

Total cruise ship calls: 10

Total passengers: 6850

Total crew: 4267

**Total on board: 11,117**

Local business support has been growing for Plymouth's cruise business, with sponsorship of the Plymouth Cruise Ambassador volunteers' uniform coming from Plymouth City Bus / Go South West, refurbishment of the cruise caravan / pop-up welcome centre being undertaken by Princess Yachts, with all costs covered by them, plus local suppliers including Plymouth Gin, Burts Snacks, and Devon Fudge, all providing samples of their local delights to cruise guests to enjoy at the welcome area. the

City Council's Street services, parking and sanitation teams have also played a key role in ensuring a safe, clean and warm welcome for cruise guests to the city, they are to be congratulated on their delivery.

Our Plymouth Cruise Ambassador volunteers now number 25, with most of them having had 'Welcome Host and 'Green edge' training. Regular social events for the volunteer team also help to build the team and create closer friendships within the group. The Plymouth Town Criers have also provided an excellent welcome, along with the Plymouth Maritime Corps of Drums (our Royal marines for the day), and others from the Plymouth Cruise Partnership, and the Barbican Traders Association.

MS Rotterdam was once again the largest ship to visit Plymouth on the 150th anniversary of the first Eastbound sailing of the Holland America Line, visiting on the 16th April 2023. An onboard event was attended by a number of Plymouth city, port, dignitaries, along with key partners and volunteer representatives for a formal presentation marking the occasion. Over 2000 passengers and many crew members came ashore for the day, providing a bumper day for our local businesses.

Marketing activity has been focused around 'Sea Trade Global in Fort Lauderdale in March, and Sea Trade Europe in Hamburg during September. Both of which were attended by our Cruise business development manager, with Plymouth Harbour Master & Cattewater Harbour Commissioners' CEO supporting in Hamburg. With neighbouring ports investing in infrastructure to accommodate larger vessels these positive marketing visits are a necessity to ensure Plymouth's growth continues. Ongoing activity has included 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.

Cruise lines continue to be the industry leaders in innovation and investment, making cruise lines the leaders for greener maritime transport. Maritime transport is responsible 90% of the world trade but is responsible for 3% of the world's emissions. Despite being the cleanest method of transport, the investment into technology, and systems in cruise lines continues to be cutting edge. Its innovations used onboard that are used within Port limits are helping Plymouth diversify, and reap the rewards seen by our neighbouring ports for the last decade. Technology such as closed loop emission cleaning, ballast water management systems, air bubbles around the hull to prevent invasive species, zero waste polices etc are a few of the many steps in place to protect the waters around the ship including Plymouth Sound as a National Marine Park.

*Pedro Batista – Silver Dawn Shore Concierge Manager “The city representatives greeted us and our guests on the Barbican Landing Stage with a small parade, Plymouth was such a welcoming port with a great deal to offer. Overall, a great stop!”*



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

##### i. Reduced capacity of Destination Plymouth and future funding

Destination Plymouth currently employs 3 full time staff and hosts the National Marine Park (NMP) CEO. In addition, the organisation contracts additional support from two contractors for specialist work including cruise and travel trade/conference activity. The two contracted staff and one of the permanent staff are self-financing through the Destination Plymouth Membership scheme, Cruise and Conference partnerships and the NMP CEO is funded through Mayflower legacy funds until 2024 at which point it is anticipated that alternative funding will be secured.

One of the other permanent members of staff is funded three days a week by the HOSWLEP via the Data Hub project until March 2025.

Funding was reduced in 2023 by £100,000 per annum, however, UK Shared Prosperity Funding has been secured until March 2025 which will keep Destination Plymouth viable until then. Resources remain tight and a longer-term funding strategy is currently being discussed to see what options are available post March 2025.

##### ii. DMO Review and regional tourism re-structuring

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 to date there are now 22 accredited 'Local Visitor Economy Partnerships' (LVEP's) in England.

The Board of Destination Plymouth has confirmed that it wishes to become accredited in line with the national process, however, has been advised that Visit England is looking for a larger county size LVEP here in Devon. Consultation funded by the HoSWLEP is currently taking place across the county with tourism and wider business organisations with a report and recommendations due by the end of the year. It is looking increasingly likely that there will be a 'light touch' solution here in Devon with an existing organisation acting as 'lead /accountable' body and delivery of key areas of activity shared out across key partners in the county. The Board of Destination Plymouth has agreed that if appropriate Destination Plymouth could act as 'lead body' however this would be subject to understanding resource requirements.

Visit England requires the following to enable a region to be accredited:

- One lead organisation
- One governance structure
- One destination management plan
- One operational delivery structure

The LEP has been approached for some additional funding to support the development of a high-level Destination Management Plan for the county alongside the report and recommendations. This will be decided at the November LEP Board meeting.

##### 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, Poole
Cornwall	Torbay	

The group secured £500,000 funding from the HOSWLEP for work to develop a regional data hub. The project is being 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 region's 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 has completed phase 1, scoping and feasibility earlier in the year and is now in stage 2 procurement. Stage 2 will see a supplier procured for delivery of the data hub project through 2024 with funding due to end March 2025.

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

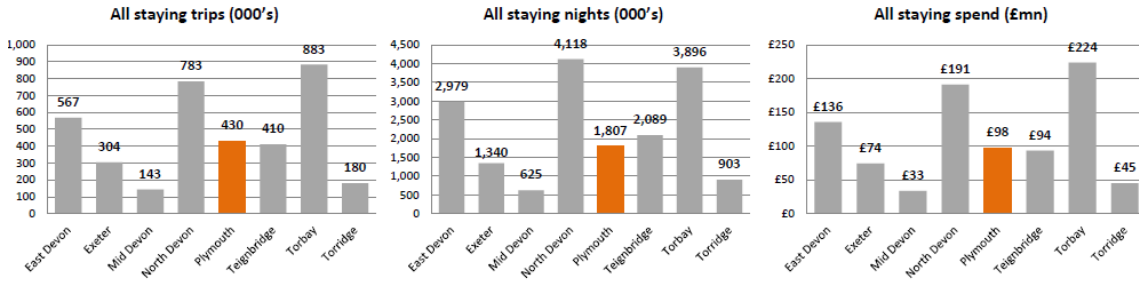
A key challenge to delivering the targets set out in the Visitor Plan is enabling enough people to work in the sector or to develop the skills required to do so. Along with many other sectors including health, adult social care and transport the tourism and hospitality sector is having a problem recruiting 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 continues to be a national issue.

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 was successfully submitted to DWP for resource as a development manager to support the sector. 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. The post is currently being recruited for and will commence in winter 2023.

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

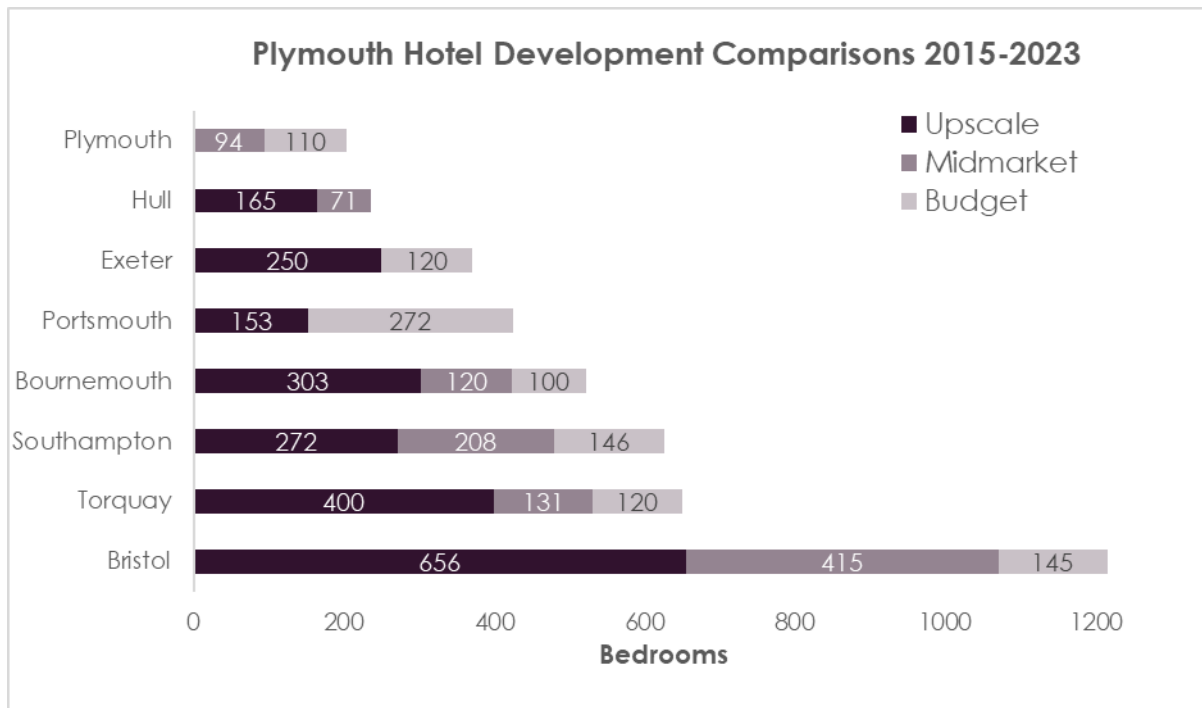
Although there have been some developments going 'live' in the city during the past three years and there has been great success with the opening of Premier Inn, Oyo and 'Moxy' in 2023 Plymouth is still underperforming in relation to its nearby competitors and as a city nationally. The chart below shows 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
Torrige	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, particularly in relation to other close competitors e.g., Torbay.



A hotel and accommodation demand study was commissioned by Destination Plymouth in December 2022 from Colliers International. The chart below shows that Plymouth is still showing very high occupancy as a city at over 80% all year around as well as increasingly strong Rev Par £65.96 and ADR £82.46. The hotel pipeline used to support the Visitor Plan targets has now slowed significantly due to the economic climate and is unlikely to come forwards before 2030.

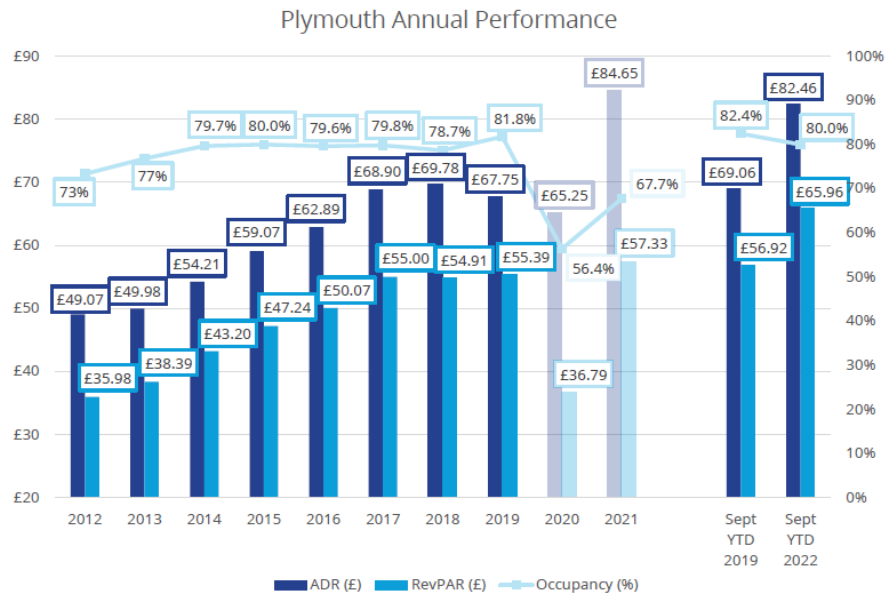
## Hotel Performance – Plymouth Annual Trends

### Strong performance

- The market showed continuing strengthening of performance 2012-2017 and maintained a RevPAR of approximately £55 during 2017-2019. The pandemic inevitably severely limited performance in 2020 and the drive for staycations in 2021 created substantial uplift in ADR. In 2022, high levels of ADR have been maintained, albeit not quite as high, but this combined with strong occupancy has generated a significant uplift in RevPAR for September Year to Date that outperforms all previous years. Sept YTD 2022 is 16% higher than the equivalent in 2019.

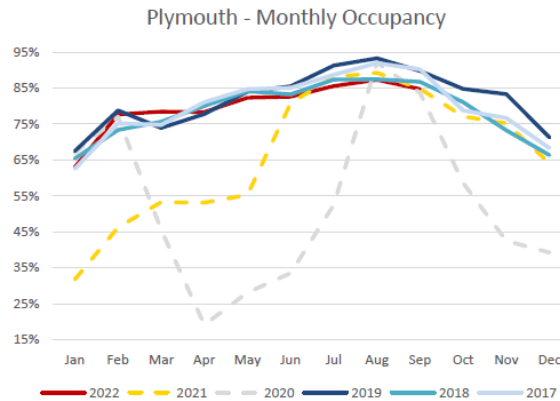
### Market undersupply

- Occupancy since 2014 has been at nearly 80% or above, which highlights an undersupply in the market.



### Strong year-round occupancy

- Occupancy by month shows strong demand for much of the year, with only December and January falling below 70%. It is a much less seasonal market than is perhaps perceived.
- In 2019 average occupancy across July to September was 91.4%. This very high occupancy suggests supply was potentially restricting overnight stays. 2022 occupancy remains high despite much higher ADRs than 2019.



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.) In addition, the chart above shows that the ‘seasonality’ of the city is flattening out with much higher occupancies ‘off peak’ than previously. This is positive from an investment perspective and is being driven significantly by the business sector.

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 businesspeople for training, business meetings and events and detracting from the

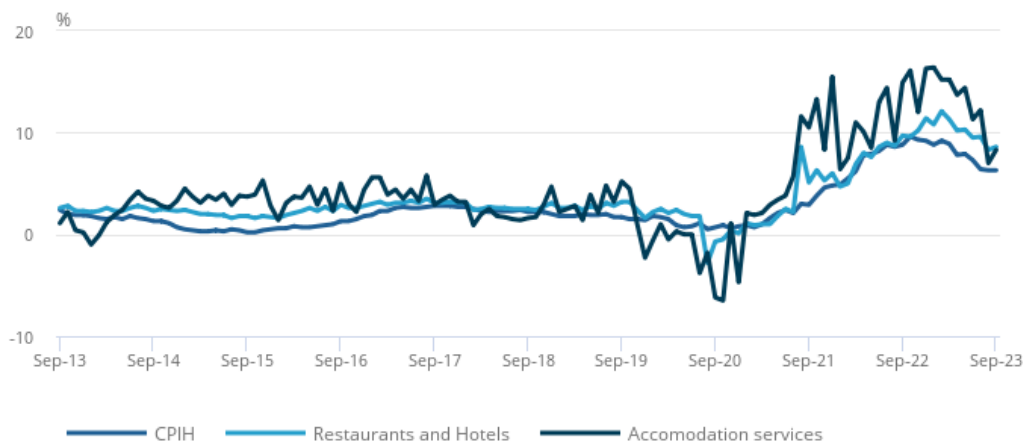
overall investment potential of the city. A survey of business demand is currently being undertaken to understand pipeline demand for the next 5 to 10 years.

#### vi. Energy and supply chain costs

These factors continue to affect the businesses within the sector and across the supply chain. Currently the food and drink and hospitality sectors are one of the highest for annual inflation which is currently running at 8.3% for accommodation and 8.6 % for restaurants. (Source ONS Sept 2023.)

Figure 4: Annual inflation rate for restaurants and hotels division remains elevated

CPIH, restaurants and hotels, and accommodation services annual inflation rates, UK, September 2013 to September 2023



Source: Consumer price inflation from the Office for National Statistics

Given the ongoing challenge for businesses in terms of profitability it is likely that we will continue to see reduced opening hours over the winter months and in some cases businesses may ‘mothball’ until spring. Pubs seems to be particularly hardest hit nationally with many closing altogether. This does not seem to be the case yet in Plymouth so far.

Specific feedback via case study from the National Marine Aquarium in relation to the current trading situation is below:

“Trading remains difficult but Footfall is holding-up in line with last year. Not surprisingly, people are taking advantage of the annual pass, so ticket mix is down a little, but retail /catering are up slightly to compensate. The planned closure of the footbridge due to the lock repair will not help, so this needs to be monitored.

Energy costs remain a challenge and are not predicted to fall much soon. We operate a rolling hedge and are c60% covered over the next year.

We continue to make small improvements to the exhibits, while working on the major scheme to retheme over the next 3-5 years. The 6 part BBC 2 series – “Secrets of the Aquarium” is due to start on Tues 14 November at 8pm.

The core programmes of the Ocean Conservation Trust are progressing in line with our Ocean Conservation Strategy.”

**vii. Activity Plan**

Progress of the Visitor Plan is monitored by an 'Action Plan' see separate attachment in the appendix. Currently good progress is being made in relation to the over 20 projects and work streams which are set out in the plan. The plan will be reviewed over the coming 12 months and works streams for the brand strategy will be adopted along with other areas of work which have been completed or stalled long term. Targets will also be reviewed at this time.