

Natural Infrastructure and Growth Scrutiny Panel



Date of meeting:	12 February 2025
Title of Report:	Visitor Plan 2030 and Brand refresh progress report
Lead Member:	Councillor Jemima Laing (Deputy Leader, and Cabinet Member for Children's Social Care, Culture and Communications)
Lead Strategic Director:	Karime Hassan (Interim Strategic Director for Growth)
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Your Reference:	Click here to enter text.
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 the development to date of a Brand Strategy for the city.

Oversight of the Visitor Plan 2030 and city brand refresh and strategy is led by the Board of Destination Plymouth. The new Visitor 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.

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' perception and identity for the city and that the original brand strategy needs to be reviewed to build on the good work to date. Recent international research by 'Bloom consulting' on the perception of 'Place and destinations' showed that 'perception affects 86% of willingness to live, work, invest or visit in a destination or place'.

The same report showed that if a city improves perceptions by one decimal point it would equal a 15% increase in receipts from tourism, 21% of talent attraction and 17.5% foreign direct investment. Perception is crucial to the growth of cities internationally.

In 2023 the DP Board set out clearly that it should 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.

A city wide brand perception study was undertaken in 2023 to enable an understanding of how stakeholders, businesses, residents and students perceive the city and the existing Britain's Ocean City branding. The results were very positive and were shared with scrutiny committee in November 2023. The report provided a series of next steps to enable successful 'evolution' and growth of the existing city brand going forwards over the next ten years. Since then, the following work has been undertaken:

- A multi stakeholder cross city brand development group has been set up.
- Multiple workshops have been held to develop brand strategy content and themes.
- An external perception research report has been completed.
- Engagement has taken place across multiple city stakeholders and local communities.
- High level brand strategy and narratives have been developed in draft.

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

- Commissioning of a piece of external perception research to understand how the city is viewed externally and what our unique strengths are.
- Development of a new city narrative to re-position the city as a place to live and work with the aim of attracting new talent
- Using the narrative to design a new creative approach and brand toolkit to attract people to live and work in the city

The key aim being to position the city as a place to 'live, work and visit. With this as a priority, work has progressed over the past 12 months to develop a broader brand and city marketing strategy with a 10-year horizon to support this activity. This strategy will enable city businesses and communities 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 will support the Growth Alliance Plymouth work by repositioning the city and attracting talent using new narratives and highlighting the unique strength and opportunities that the city offers.

The Board of Destination Plymouth would like to thank Babcock, Princess Yachts, University of Plymouth, The Box and Plymouth City Council as accountable body for Uk Shared Prosperity Funding for providing the funding support to enable the Brand strategy to be developed.

In terms of the Visitor Plan recovery in the visitor economy has been steady post Covid 19 and up to 2023 based on our most recent Cambridge Economic Impact model. This shows that there has been steady growth and spend has recovered nearly back to 2019 levels. This is a nationwide scenario for domestic tourism generally although there has been strong inbound recovery for key UK visitor markets internationally.

2023 Cambridge model data shows the following visitor data:

- Visitor numbers - 4,332,000 million (16% down on 2019)
- Visitor spend - £335,656,000 million (2.6% up on 2019)
- GVA - £258,401,000
- Employment – 6579 (5% of employment – 2% down on 2019)
- Total tourism supported turnover £474,240,000

This reflects the loss of tourism business capacity and also the economic factors affecting visitor spend and frequency of visits. Despite this Plymouth continues to perform relatively well within the South West region and some remarkable outputs have been achieved across the different partnership teams to continue to raise the profile of the city.

In the current environment it is crucial that Plymouth finds the funding resource to not just to continue to promote its visitor offer externally as widely as possible but also to promote the city as somewhere to live and work or invest. This will be particularly important to gain competitive advantage in relation to other areas in the South West region and also national competitors who are gaining market share.

Recommendations and Reasons

That the Panel:

1. Continues to support the work of Destination Plymouth to lead delivery of the Visitor plan and emerging new brand strategy working with wider City stakeholders and partners;
2. Supports the continuing 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, BID and partnership teams in supporting the sector and moving the brand strategy forwards;
4. Endorses the adoption of a city-wide brand strategy and new narratives 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 fifth year of operation and continues to set a direction of travel for the visitor economy in the city.

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 Visitor Plan and emerging new brand strategy will help to inform the new Plymouth Plan to 2050 process setting out key narratives and a new positioning for the city as a place to live and work.

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 2026. 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 five 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.

In 2024 £25,000 was secured as match funding for UKSPF funds from private sector businesses across the city to develop a new brand strategy and narrative. We are very grateful for the support of Babcock, Princess yachts, University of Plymouth and The Box for providing the funding to enable the strategy to be developed.

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 regarding delivery of the Visitor Plan and Brand strategy are as follows:

Post 2026 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.

Waterfront Bid renewal due in 2025.

National re-structuring of tourism has impacted Plymouth's ability to draw down funding within the wider county context.

Gap funding for hotel developments from private sector investment is required to address market failure in developments going forwards

Carbon Footprint (Environmental) Implications:

Destination Plymouth Ltd. is 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. As the new Brand strategy for the city is developed a key strand running through it will be linked to environment, nature and sustainability.

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. Health and Safety is managed through the Peninsular 'Bright' Health and Safety scheme. 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 Jemima Laing – PCC
Nigel Godefroy – City Centre Co	Lindsey Hall – RIO
Adrian Bratt – Princess Yachts	Paul Fieldsend Danks – AUP
Brigadier Mike Tanner – HMNavy	Tracey Lee – PCC (observer)
Elaine Hayes – NMP (observer)	Hannah Harris - Plymouth Culture (observer)
David Draffan – PCC (observer)	

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	Briefing report title							
B	Perception research report Jan 2025							
C	PR media highlights 2024							

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) <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

Sign off:

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Originating Senior Leadership Team member: Karime Hassan											
Please confirm the Strategic Director(s) has agreed the report? Yes											
Date agreed: 31/01/2025											
Cabinet Member approval: Cllr. Jemima Laing											
Date approved: 29/01/2025											

APPENDIX A.

Visitor Plan 2030 and Brand Strategy progress to date.

I. Overview

The last Scrutiny Committee report (November 8th, 2023) 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 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. With this in mind and for ease of reading the items have been split into two sections.

SECTION I: CITY BRANDING AND POSITIONING UPDATE

I. 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 has become apparent that there are aspects of the brand that need further development in order to continue to grow a strong 'place' perception and identity for the city and that the original brand strategy needs to be reviewed to build on the good work to date. Recent international research by 'Bloom consulting' on the perception of 'Place and destinations' showed that 'perception affects 86% of willingness to live, work, invest or visit in a destination or place'.

The same report showed that if a city improves perceptions by one decimal point it would equal a 15% increase in receipts from tourism, 21% of talent attraction and 17.5% foreign direct investment. Perception is crucial to the growth of cities internationally.

During 2024 good progress has been made on creating a new 'Brand strategy' for the city. Supported by a 'City Brand Development Group' as a steering committee a framework for the strategy has been developed along with two other pieces of work to inform and guide decision making. This report provides an update on those three areas of work to date.

2. External Perception research

This piece of work has been commissioned to identify and explore external perceptions of Plymouth in the context of the Plymouth, Britain's Ocean City brand. The research has helped gain insights and intelligence into the current perceptions of the city by consumers and businesses as well as understanding how the city is portraying itself outwardly. Specifically, a key element of this work has been to identify opportunities for Plymouth to attract new talent to the city to live, work and study. This research is being used to inform the development of a new emerging brand strategy and a refreshed narrative and creative approach. The work considers how we can build on the existing brand equity and develop connections, engaging with new audiences relevant to our evolving city objectives. The new narrative and creative will be used across all city led and engaged stakeholder communications to support the positioning and marketing of the city as we move from a visitor led destination to a whole city brand led approach.

The 'External Perception Report' covers two specific areas of work:

- **Talent attraction research** — Evaluate the city's four growth sectors — Identify key assets within Plymouth — Size of the market demand and supply — Competitive clusters — Talent attraction and retention factors — Strengths, weakness and opportunities for Plymouth
- **Perceptions research** — Explore positive and negative perceptions of the city as a visitor and talent destination — Perceptions of its location, lifestyle, and opportunities — Understand differences between internal and external views — Use as helpful direction for brand refresh

As often is the case with perception research of this nature there were many positive aspects identified which we are aware of already, however, there were also a number of key findings which were less well known and can be used to build on specific aspects of the city's' potential.

The research revealed four key insights:

#1 The ocean is Plymouth's most recognisable and powerful asset, and its full potential is yet to be realised.

Evidenced by:

- Home to the UK's first national marine park
- The largest naval base in Western Europe
- Supporting 38% of employment nationally in marine industries
- Plymouth Sound is one of the oldest continually studied marine areas on earth
- SMART sound is the world's first testbed for developing products and services for the marine sector.
- Largest marine scientists & technologists grouping in the UK
- University of Plymouth is home to 1 of 35 wind and marine renewables industry research and development centres in the UK

#2 Plymouth's quality of life is greater than other comparator cities, with the evidence to prove it.

Evidenced by:

- Plymouth's wellbeing metrics score higher than peer cities like Bristol, Portsmouth and Southampton according to ONS data
- Plymouth ranked first in PWC's annual Good Growth for Cities Index, scoring especially well on world-life balance
- Natural England 2024 mapping shows 25% of the city (land, water and intertidal areas within the city boundaries) are important nature area.
- The city has 1,390 hectares of priority habitat, including over 800 hectares of woodland and 282 hectares of coastal habitat
- The city has planted over 20,000 trees in the last 5 years

Anxiety		Life satisfaction	
Plymouth	3.23	Plymouth	7.45
Brighton and Hove	3.31	Brighton and Hove	7.39
Portsmouth	3.38	Portsmouth	7.38
Bristol, City of	3.44	Bristol, City of	7.31
Southampton	3.81	Norwich	7.3
Norwich	4.37	Southampton	7.23
GB average	3.21	GB average	7.48

Happiness		Worthwhile	
Plymouth	7.71	Portsmouth	7.74
Portsmouth	7.37	Plymouth	7.72
Bristol, City of	7.2	Brighton and Hove	7.67
Norwich	7.07	Norwich	7.62
Southampton	7.07	Southampton	7.54
Brighton and Hove	7.03	Bristol, City of	7.33
GB average	7.41	GB average	7.77

Source: ONS Wellbeing Metrics

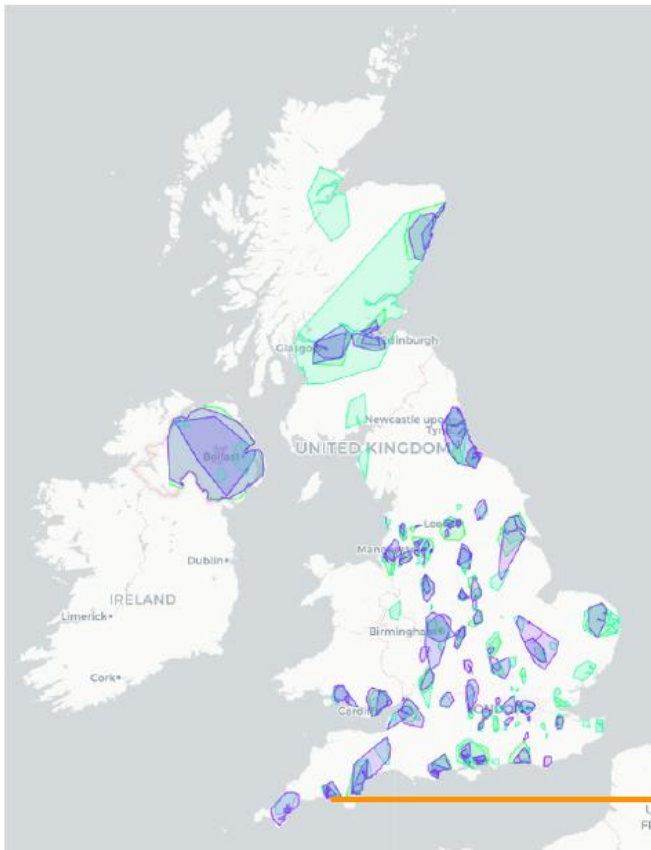
#3 Talent is looking for career growth, but the city is not known for innovation.

Evidenced by:

- Across Plymouth's four key growth sectors, talent is looking for opportunities to progress
- Research found that perceptions of Plymouth as an innovative city is lagging behind
- Graduates cite lack of opportunities as main reason for leaving the city

However,

- Plymouth is an 'innovation' hotspot according to 'Innovate UK'
- Workforce specialisms are in engineering and technical professions, advanced manufacturing and metalwork but constraints on labour market limiting sector development and potential
- There are established and expanding clusters in marine industries, defence, health and life sciences and creative industries
- Business survival rates in the city are higher than comparator cities

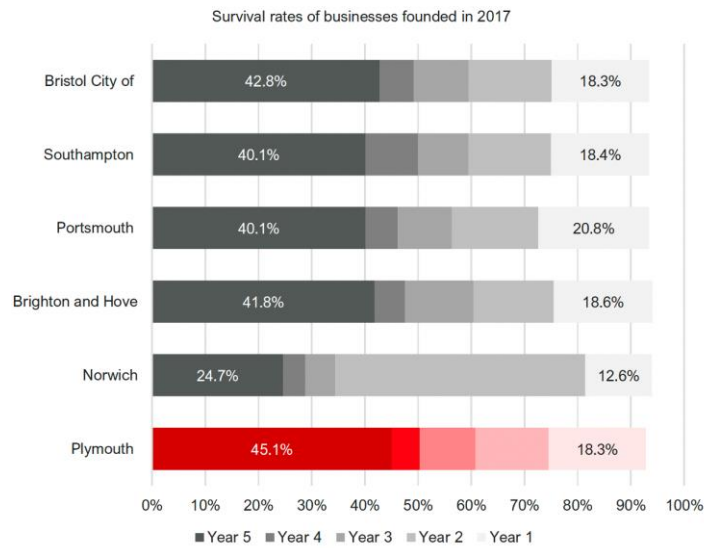


- Advanced Manufacturing [RTIC]
- Advanced Materials [RTIC]
- Research and Consulting - Physical Sciences and Engineering [RTIC]
- Life Sciences [RTIC]

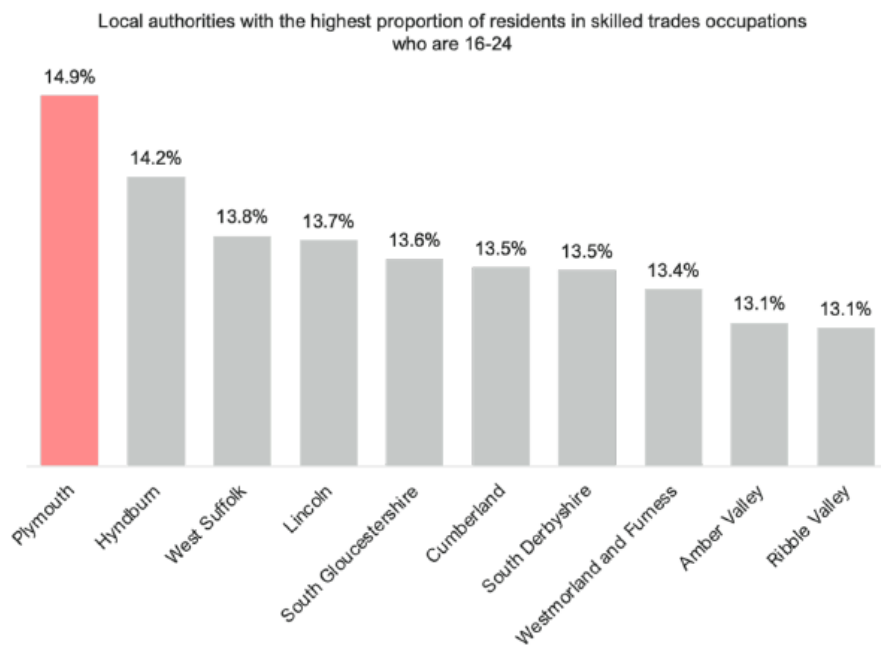
Specialisms: physical sciences & engineering, advanced manufacturing & materials, life sciences, photonics

There are a high proportion of start-up and SME companies, but also a significant number of established businesses

Source: Innovate UK



Source: ONS Business Demographics



Plymouth is in the top 20% in England and Wales for the proportion of workers in skilled trades occupations – 12.8%

#4 Plymouth's cultural offer and creative industries have the potential to shift perceptions of the city.

Evidenced by:

From the 'The Box' to Theatre Royal, TR2 and Arts University Plymouth, the city is emerging as a city of creativity and culture

Perceptions research found that people were surprised about Plymouth's exciting cultural offer

University of Plymouth, including i-DAT, immersive media lab, digital fabrication, screen printing, film studios, immersive dome are all growing creative organisations

Plymouth is growing co-working spaces that support the creative industries, including Ocean Studios, Eat Work Art, Alma yard

The creative industries provide Plymouth with over 5,000 jobs – plus nearly 4,000 more creative jobs in other industries contributing at least £134.9 million GVA

From these insights and the research as a whole a number of key opportunities to re-position the city as a place to attract talent to live and to work have been identified:

#1 Celebrate the ocean's all-encompassing benefits: from creative inspiration to scientific discovery

#2 Make Plymouth synonymous with greater quality of life

#3 Showcase Plymouth's available opportunities and how innovation threads the city's past, present and future

#4 Define creativity's USP: combination of maximum access and production

In addition to the key opportunities, the research identified specific themes to be considered in the brand going forwards:

- Plymouth's economic specialisms contribute to national security, from defence to research
- Capture the friendliness and community feel as a welcoming city

- Show full family support to ease talent's decision to move to Plymouth
- Proactively connect young talent with existing opportunities within the city
- Reflect Plymouth's future story: £6 billion pipeline investment from public/private sector into the city will be transformative to attracting talent

The report suggested 10 key opportunities that we can move forwards as a city to re-position our brand and grow our reputation nationally and internationally. This has formed the basis of the second piece of work which is to develop a new narrative for the city that reflects the contemporary place we are today.

- Tell an evocative story that captures how the ocean makes you feel
- Make the city synonymous with greater work-life balance
- Elevate Plymouth's defence and scientific specialisms by making them nationally significant
- Showcase the business ecology so talent can see themselves grow
- Close young people's perception gap around available job opportunities
- Use innovation to thread the city's past, present and future
- Provide full family support to help talent choose Plymouth
- Give culture a bigger platform
- Create a stronger location message than "end of the line"
- Let Plymothian personality shine

See supporting Perception Research presentation in the appendix for this paper.

3. Development of a new narrative and creative approach for the city

Following on from the perception research key themes and city strengths have been developed as a new narrative to re-position the city building on the successful Britain's Ocean City' branding. The narrative and creative will be available for use by engaged stakeholders and city partners for communications to support the positioning and marketing of the city as we transition from a visitor led destination to a whole place brand led approach. A creative approach to developing an overarching city narrative with supporting themes was a core element of this brief as the city's story needs be curated in a way that is appealing and compelling to our target audiences. This includes ensuring that the narrative reflects our own Plymouth personality and engages with the community through authentic content and stories.

The results of these two pieces of work have been shared across multiple stakeholders and tested with local communities through a co-creation week series of workshops and open sessions in the city. This included student representatives and diverse community groups.

The aim of the work was to build on the perception research findings to create a narrative: capturing Plymouth's strengths in a compelling story and then use this to develop a striking new visual identity: true to the city and stands out against peers.

Our existing city branding 'Britain's Ocean City has stood the test of time well and has built up valuable brand equity over a period of time. In a survey conducted towards the end of 2023 there was overwhelmingly positive support to maintain and build on the Britain's Ocean City concept but also to develop a narrative which moves the city forward into the future and does not rely just on our significant heritage assets.

'Plymouth, Britain's Ocean City' branding represents the following key strengths of the city:

Britain: nationally important, significant global marker

Ocean: big, evocative, captures the imagination

City: dynamic, opportunities, urban

However, we need to expand this and consider new narratives. We need positive statements that override some of the negative external perceptions of the city which were discovered in the External Perception Research work.

Negative external perceptions

“Just about the navy”

“Has no opportunities”

“Is far away”

“No culture”

“Not diverse”

Positive counter positioning

“An Innovative city”

“Career growth”

“Lifestyle location”

“Creativity is all around”

“Empowering community”

So, we are now working with our creative team, key stakeholders and our local community to create new narratives for the city to reflect the strengths and opportunities highlighted above.

A number of key themes have so far emerged which we are exploring:

Amazing journeys begin in Plymouth:

There is a lot of opportunity here:

The city is wild about nature:

Plymouth creativity has no bounds:

We have a community that goes beyond:

We’re charting an exciting future:

These themes will be refined and developed and created into a new ‘Brand toolkit’ with visuals and assets, proof points and research data for multiple stakeholders across the city to use.

4. Brand strategy

Over the past 18 months a wide-ranging group of city stakeholders has been working on the two projects above and also to create a Brand Strategy for the city. The Stakeholder group includes:

Name	Company
Paul FieldsendDanks (Chair)Jacqui Moore	AUP
Jacqui Moore	AUP
James Smith/Melodie Mapstone	Babcock
Stuart Elford	Chamber
Pauline Hands	City College
Lee McQueen	City College
Dave Briggs	Building-brands.co.uk

jabo	DBI
Pamela Badham	Four PR
Cristina Artico	Four PR
David Briggs	Nash & Co
NASH, Amanda (UNIVERSITY HOSPITALS PLYMOUTH NHS TRUST)	NHS
Kim (UNIVERSITY HOSPITALS PLYMOUTH NHS TRUST)	NHS
Elaine Hayes	NMP
Elinor Firth	PCC
Richard Longford	PCC
Sarah Lloyd	PCC
Nina Sarlaka	PCC
Catherin Gledhill	PCC
Jemima Lang	PCC
Stephanie Lewis	Plymouth Active
Rhys Jones	Plymouth Active
Mary O'Leary	Plymouth Community Homes
hannah harris	Plymouth Culture
Clare Martin	Plymouth Uni
Simon Clare/Adrian Bratt	Princess Yachts
Ian McFadzen	Ocean Conservation Trust
Victoria Pomery	The Box
Jennifer Thomas	Theatre Royal

A city brand strategy creates a single brand for the city and extends it to all its offerings and interactions. From a consumer's point of view, this creates a unique picture of the city at every level of interaction. This also helps in removing the need to present a case-by-case picture of the city for each of its offerings to the customers. A city brand is its promise of value, a promise that needs to be kept. Good branding can assist in making cities desirable, just as bad branding can assist in making cities undesirable. Some examples of well-branded cities are New York City, San Francisco and Paris. It is seen that the successful city brands market their history, quality of place, lifestyle, culture, and diversity, and proactively formed cooperative partnerships between local authorities and government in order to enhance their infrastructure. 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.

The emerging new high level brand strategy sets out a direction of travel for the city over the next ten years with our vision, mission and aims along with high level objectives, target audiences and how we will deploy our brand messaging across them.

The draft strategy is still work in progress. It is due to be completed by end of March prior to going to Cabinet in April.

SECTION 2: VISITOR PLAN PROGRESS REPORT

I. Visitor Plan progress report

The Visitor Plan 2030 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

Our objectives are grounded in wise growth of the value of the visitor economy. Our focus is 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 consumer activity

Events

2024 has been another busy and successful 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. Overall, the team delivered events that reached over 500,000 people. Signature events remained strong and Armed Forces Day and the Rehabilitation Triathlon were great successes from our sponsors' perspective – Babcock and Aecom.

ABP Ports were delighted with the British Fireworks Championships and we have retained their support on this year's Champion of Champion's event. Care experienced young people were again at the heart of the event with the Young People's Choice Award sponsored by Citybus. The event was attended by over 100,000 visitors, was live streamed to a global audience. It delivered a direct economic impact to Plymouth of £2.8 million.

The Summer Sessions in Partnership with Live Nation was a huge addition to our events calendar. Legendary artists – Tom Jones, Sting, Blondie, Madness and Bryan Adams hit the Hoe and brought over 30,000 fans with them. The team have secured a 5 year partnership with Live Nation and we look forward to working with them again this summer.

In excess of 10 paid grassroots opportunities were facilitated in 2024 across PCC signature events. (The Native, Freshly Squeezed, The Cabarats, King Dinosaur, Hayward, Black Friday, Feel Good Factory, The Big Strut, Rockafella, Jessica and the Rabbits). This does not include grassroots performance slots facilitated as part of the BID events.

Plymouth Waterfront Partnership joined forces with the National Marine Park to deliver Seafest and will continue to develop this relationship to celebrate Britain's Ocean City together.

Flavour Fest was 20! Over 80 stalls of fantastic local produce were in attendance on the Piazza and The Bazaar offered a buzzing cultural experience with more delicious food and music. There was a packed programme of inspirational talks and demonstrations by top local chefs as well as the free food craft workshops.

Inclusion and accessibility remain a priority and PCC events were awarded a bronze medal from Attitude is Everything Live Events Charter, which is an industry standard designed to help build disability equality into all aspect of the events. We had more events supported with BSL by Complete Communications and the team continues to review and improve.

The Events team are working towards PCC shared goals of net zero by 2030. However, the challenge remains that with more events and more visitors, there is a continued impact on the carbon footprint. The action plan in place looks like at what steps can be taken to reduce carbon output with PCC Managed and third-party events including benchmarking, offsetting, cleaner power, recycling and greener transport opportunities. We worked closely with charity and community litter pickers 'Clean our Patch' on our events alongside our PCC litter picking teams.

Marketing

Marketing activity – the city council and Destination Plymouth marketing teams have been very proactive during the last 12 months working towards a digital led programme of activity.

- Visit Plymouth social media

Primary platform for promoting Plymouth as a visitor destination and our main focus for content

Main channels Facebook, Instagram, TikTok. Top level social stats which show positive increases across the board:

- Audience: 38,746 (27% increase)
- Audience growth: 8,062 (134% increase)
- Impressions: 9,687,142 (11.8% increase)
- Engagements: 361,724 (2.8% increase)
- Video views: 1,580,992 (404% increase)
- No. of posts: 1,796 (102.3% increase)

- Video

We understand that 'video is king' and updated our strategy across our digital output (both VP and What's On Plymouth) to focus on video content, with number of video views increasing by 224% on previous year. Total watch time equates to over 226 days. We launched TikTok in March, targeting a younger audience. Although it has a much smaller amount of followers than Instagram and Facebook, TikTok has more video views (512,611) than Instagram (424,557) and nearly as many as Facebook (643,824).

- Influencers

We have embraced working with local and regional micro-influencers to amplify what's going on in Plymouth. One stand-out video was with @CurlyGaz, a local food celeb promoting food in the city. We used him for a Christmas feature on local food and drink with over 140,000 views, hundreds of comments and likes.

- Takeovers

We have begun 'takeovers' with partners, our latest where we worked with The Box to 'takeover' the Visit Plymouth channel, giving a deeper insight into The Box, with engaging activities online with quizzes, did you know? etc.

- Business spotlights

We have also increased our work with Destination Plymouth members, showcasing their businesses through video.

- Newsletter

Increased our database by nearly 50% to 15,251 subscribers. We will be working hard to make sure quality content keeps subscribers and be using partnerships and competitions to increase our uptake.

- Website

1.9 million page views and just under 800k users on Visit Plymouth. Top pages include: Events Calendar, British Firework Championships, Things to do, Bonfire Night, Attractions, Music, Pirates Weekend

- What's On Plymouth socials

What's On Plymouth (Facebook), which is utilised to promote Plymouth's major events and provide people with a regular 'events calendar', saw a 5% increase in audience to 77,848, over 1,000 published posts, over 9.2 million impressions (just under Visit Plymouth which has 4 channels) and 517,980 engagements.

- Major events

Our major event promotion across social media channels had over 5.3m impressions and 414,791 engagements, and over 326k page views on the website.

- Combined socials

Audience: 144,021

Audience growth: 11,832, Impressions: 19,292,57, Engagements: 889,010, Video views: 1.84m, No. of posts: 3,686

ii. PR coverage

Our national PR team at 'Four' have continued to drive great coverage and audience reach for the city as a visitor destination as well as a broader range of topics working with the brand development group

over the past 12 months. Total pieces of coverage: 261. Total OTV (opportunities to view): 1,079,754,494. Total £AVE (advertising value equivalent): £43,993,497.

See separate report attached with media highlights.

A new strategy has been implemented to support the wider city branding work with the focus on pushing PR into key vertical markets to support the city's growth sectors. Key partners on the city brand development group have been involved and have worked jointly on national positioning pieces to start to generate coverage and awareness in media that have not been previously targeted.

iii. International and UK domestic trade activity

- International:

This year focus has been very much on UK domestic trade activity. Marketing budgets have been significantly lower than 2023 so international activity has focused on e-mail activity into our current database of buyers and PR activity. The exception to this is Britain and Ireland marketplace which was held on 26th January 2024. BIM is an annual B2B workshop, organised by the European Tourism Association (ETOA) to showcase Great Britain and Ireland to tour operators and travel buyers from around the world. It involved a series of pre-scheduled, one-to-one appointments – providing a valuable opportunity for us to meet, and do business with, the 200 international travel buyers in attendance. We had 34 appointments and great interest in the new Moxy Hotel and the National Marine Park. Focus is still very much on Mayflower for the US market.

- UK trade activity has focused on the following:

British Travel Trade Show – 20th/21st March 2024. This is the UK's largest trade show held at the NEC in Birmingham. Tour operators, Coach Operators, Group Travel Organisers, Travel Agents and wholesalers visit the British Tourism & Travel Show each year. They attend to get ideas for group trips, tours and itineraries, to find products and services that make planning simple, and to make their customers' experiences exceptional. We had 5 stand partners who supported us on the stand – Plymouth Boat Trips, Visit Tamar Valley, The Box, Leonardo Hotels and Kynance Hotel.

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 as well as a heritage itinerary especially for the international and groups trade. We also joined the CTA - Coach Tourism Association with the aim of attracting more coaches and groups business to the city. A new 'Hidden Heritage' itinerary was created for the groups and trade.

Familiarisation Visits:

The team hosted Inntravel over the summer and Plymouth is now added to their South West Itinerary. We also hosted a fam visit in partnership with Hassle Free Hiking – Plymouth Gin, Barbican and NMA are now all included as part of their product offer.

iv. Conference and meetings activity

2024 has been a busy year for the city with incoming conferences including the Napoleonic Federation in May, and Urban Design Forum in September and Marine Stewardship council in October as highlights.

The Meet Plymouth Showcase event was hosted on 11th Sept 2024 at The Box – 23 stands and 35 delegates attended and over 100 local businesses were invited.

We continued our membership of the Meetings Industry Association (MIA) and have been attending Destination Web Seminars and Pop-Up Discussions as well as making use of the free training sessions for the team. On the back of our membership we also visited Confex March 24 at London Excel.

Working the current Meet Plymouth database and regular newsletters are being sent out and a new 'local buyers' database has been created.

Work has been delivered on the Meet Plymouth website, content has been updated, offers being obtained and blog posts going out monthly. We are now seeing more frequent conference enquires coming in as a result.

A new Instagram account has been created, and we are encouraging members to share content on this channel.

121 meetings with Meet Plymouth members took place over the 12 month period to help them create new product and offers

Work on the next Meet Plymouth Venue Showcase – 23rd Jan 2025 (27 stands and 60 businesses attended).

Working with the SW Data Hub we have created a conference data tool as part of the app. Currently we are encouraging members to sign up and load their data so we can track conferences 'real time' and see forward bookings.

v. Membership engagement

We currently have 47 paying members of Destination Plymouth contributing to £22,633.26 membership income annually. In addition, all members of the City Centre and waterfront Business Improvement Districts get membership benefits free as part of their BID levy contribution.

We have regular buy-in opportunities as part of our seasonal campaign activity, generating an additional £7,811 this financial year, as of 24/01/2025.

We host regular membership meetings with our partner venues and suppliers and update them on activity. 121 members meeting also take place face to face, held with 2-3 members a week. Meet Plymouth activities are supported and attended, increasing membership engagement. Attention is being paid to grow our LinkedIn channels, with a membership campaign being broadcast alongside our constant activity, this is with a view to generating more leads in 2025.

In 2024 we did not host an annual conference due to staff capacity issues. It is intended to hold a conference in May 2025 as part of the city brand strategy refresh. Our next networking evening is being planned for early April 2025.

vi. Cruise and marine marketing activity

2024 has been the best season to date with 13 ships visiting in total and over 13,000 passengers and crew. 2025 is already looking good with 13 booked already including a new addition from Norwegian Cruise Lines, one of the largest global operators. The Norwegian Pearl is booked in May with over 3,000 passengers onboard. Bookings are currently being placed up to 2028.

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.

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.

Our Plymouth Cruise Ambassador volunteers now number 2. Led by Douglas and Annemarie Kerr they provide a fantastic and enthusiastic port welcome for cruise guests to the city along with local businesses who showcase as they arrive onshore.

Marketing activity has been focused in 2024 around Sea Trade global in Miami in April, Sea Trade Med in Malaga in September and the Cruise Britain Winter meeting in December. Good progress has been made in arranging familiarisation visits for cruise buyers in March 2025 and also a bid has been put in to host the Cruise Britain Summer event in June 2025.

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 policies 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.

vii. 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.

A funding application was successfully submitted to DWP for resource as a development manager to support the sector and was recruited in spring 2024. Within the first seven months of the 18 months contract, the Visitor Economy Coordinator is exceeding expectations of the Department for Work and Pensions contract by having already supported 207 claimants, plus 23 non-claimants, with 65 of these individuals already into employment, 26 into training and education, and 333 interventions underway to support individuals with multiple pre-employability support to support their transition towards employment (Jan 25).

viii. '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.

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 is now in its third year. The Data Hub provides regular, robust data on consumer behaviours as well as business data to more effectively enable decision making for the region's tourism businesses. This is already having a positive impact on the Visitor economy in Plymouth and across the region enabling better marketing decisions and more efficient targeting of resources.

The Cambridge model is always at least 12 months behind and we have not yet got the 2024 data which is due August 2025. The newly launched South West Data Hub is specifically relevant to understand more 'real time' data in relation to the visitor economy including footfall, visitor numbers, spend and perception data to name but a few.

The project moves into a post grant funded period after March 2025 and work is currently underway to secure funds from partners to support the Data hub commercially going forwards. The system requires £40,000 per annum to be secured across Devon and Somerset including public and private sector partners.

ix. Partner led projects highlighted within the activity plan which are moving forwards at pace include:

- Horizons Project led by Plymouth City Council which has nearly completed year 1 of the delivery phase. Capital projects linked to this include Tinside Lido which is on schedule to be completed early 2025.
- Funding of £700k has been secured successfully by Plymouth Culture and the Horizons project to develop a 'digital' park which will commence early 2025.
- Plymouth Cruise and ferry port development in partnership with ABP and Plymouth City Council has also moved ahead successfully and initial works including a new passenger gantry are due to be completed by end of this year.

2. Factors affecting Destination Plymouth Brand 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/ (MEET Plymouth) 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 and Horizon project funds until 2026 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 when the grant funded term ends.

Funding was reduced in 2023 by £100,000 per annum, however, UK Shared Prosperity Funding has been secured until March 2026 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 available post March 2026 are.

ii. Devon Local Visitor Economy Partnership

The Devon Local Visitor Economy Partnership (LVEP) has now been in place for approximately 12 months. Destination Plymouth is acting as strategic lead for the voluntary partnership. The group has recently completed a draft 'Growth Plan' which is in the process of being signed off. No funding is available as yet to support delivery other than existing funding within partner budgets. Visit England are asking the Department for Culture Media and sport to provide some funding to support LVEP delivery nationally as part of the government's comprehensive spending review.

iii. 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. It is estimated that Plymouth requires approximately a further 1,000 serviced bed spaces mainly in the four star plus category to enable it to meet the visitor targets by 2030.

i. Activity Plan

Progress of the Visitor Plan is monitored by an 'Action Plan'. 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 is reviewed quarterly at Board meetings.