

PLYMOUTH CITY COUNCIL

Subject: Plymouth Visitor Plan - Refresh 2020-30
Committee: Cabinet
Date: 5 March 2019
Cabinet Member: Cllr. Tudor Evans
CMT Member: Anthony Payne (Strategic Director for Place)
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Ref:
Key Decision: Yes
Part: I

Purpose of the report:

This report follows on from the paper which was brought to Cabinet on 20th November 2018 to seek approval for the refresh of the Plymouth Visitor Plan from 2020 to 2030. Following extensive consultation from a wide range of stakeholders and development of initial concepts, we are now seeking approval for adoption of the strategic principles that will underpin the business planning process as we move the strategy refresh forwards.

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

Tourism is one of the big success stories in Plymouth. Over the last decade tourism has seen visitor numbers and visitor spend each grow by over 20%. Around 5.1 million visitors make a trip to the city every year spending £347m*. Today tourism employs over 8,000 people* and delivers £258 m* GVA.

There is a need to refresh the Visitor Plan in the light of an evolving marketplace, the significant progress against the existing plan, and new opportunities arising, including how best to capitalise on the Mayflower 400 legacy, and the proposal to establish the UK's first Marine National Park. Consequently, it is important to put in place new ambitions, objectives and projects for the city to progress towards 2030.

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

*Cambridge model 2017 data, South West Tourism Research.

Corporate Plan:

Plymouth is Britain's Ocean City and the visitor economy is a major contributor to our economy, local community and vibrant waterfront city. The refreshed Visitor Plan aims to address Growing Plymouth priorities, in particular economic growth, jobs, skills and sustainability.

**Implications for Medium Term Financial Plan and Resource Implications:
Including finance, human, IT and land:**

Destination Plymouth Ltd currently receives revenue funding from PCC per annum up to the financial year-end Mar 2021. This forms part of the City Council's £2.25 million commitment to Mayflower 400 up to end March 2021 and is included within existing revenue budgets.

In addition to this, PCC supports city marketing and advertising within the existing economic development team and revenue budget, coupled with support for and from the Business Improvement Districts.

Over the past three years Destination Plymouth Ltd has helped to leverage over £6.5 million income, through grants for specific projects related to the existing Visitor Plan for 2010-20 and Mayflower 400 programme.

To ensure that the Plymouth Visitor Plan can continue to be delivered, it is proposed that the City Council continues its commitment to core fund Destination Plymouth from within the Economic Development Department's existing revenue budgets. Destination Plymouth will also continue to identify core funding from external sources including BIDs and commercial income generating activity.

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

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

Consultation work on the Visitor Plan to date includes a vision, high-level ambitions and enabling priorities designed to create new jobs and opportunities for local people. A detailed Business Plan and Marketing Plan are due to be prepared later in 2019, which may contain specific recommendations that relate to the above.

Equality and Diversity:

Has an Equality Impact Assessment been undertaken? Yes

Recommendations and Reasons for recommended action:

The report requests that Cabinet:

- 1) Recognises the progress and work to date on the refresh of the Plymouth Visitor plan;
- 2) Adopts the strategic principles and direction of travel that are recommended in the report subject to any recommendations from Scrutiny;
- 3) Supports the process to now develop a detailed operational Business Plan and Marketing Plan for the three years beyond 2020 and on a rolling basis thereafter, to clarify specific delivery

priorities. The detailed business and marketing plans will be brought back to Cabinet for ratification and formal adoption in December 2019;

Reasons:

- 1) To ensure the city has a robust, credible and effective plan to grow the city’s visitor economy to 2030;
- 2) To ensure Destination Plymouth can continue to support delivery of the city’s visitor plan.

Alternative options considered and rejected:

The alternative option is not to refresh the Visitor Plan, which could affect the city’s ability to position itself as a destination not just for visits but also for inward investment and living. This could have significant negative impacts on the city’s overarching growth strategy, the Plymouth Plan, to 2032 and would limit the contribution that growing the visitor economy can make to productivity and job growth at a time of considerable economic uncertainty.

Published work / information:

Plymouth Visitor Plan Framework 2020-2030 Blue Sail report

Plymouth Visitor Plan Framework 2020-2030 Plan on a page

Appendix – list of stakeholders consulted on the Plymouth Visitor Plan Framework 2020-2030

Background papers:

Title	Part I	Part II	Exemption Paragraph Number							
			1	2	3	4	5	6	7	

Sign off:

Fin	SA. 18.1 9.22 6- 21.0 2.19	Leg	ALT /305 08/2 1	Mon Off	ALT /305 08/2 1	HR		Assets		IT		Strat Proc	
Originating SMT Member													
Has the Cabinet Member(s) agreed the content of the report? Yes													

1.0 Background

To help drive the city's visitor economy, Destination Plymouth Ltd. was formed in 2008 and incorporated in June 2010 as a public-private sector partnership and arm's length company of Plymouth City Council, which owns the major shareholding. In 2010 the partnership commissioned a Visitor Plan for the city with the aim of growing the visitor economy and the jobs it supports over the 10 years from 2010 to 2020. Shared leadership and delivery of the existing Visitor Plan has secured significant results and leverage on the City Council's and wider stakeholder contributions. (For details please refer to Cabinet Report dated 20 November 2018, entitled Plymouth Visitor Plan – Refresh 2020-30)

2.0 Introduction

This report seeks Cabinet recognition of work to date on the refresh and seeks approval to adopt the strategic principles and direction of travel that are recommended including the vision, high-level ambitions and enabling priorities for the refreshed Visitor Plan. It is also requested that Cabinet supports the process to now develop a detailed operational Business Plan and Marketing Plan for the three years beyond 2020 and on a rolling basis thereafter, to clarify specific delivery priorities. The detailed business and marketing plans will be brought back to Cabinet for ratification and formal adoption in December 2019.

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

The Plymouth Plan and the existing Visitor Plan (2010-20) all highlight the importance of Plymouth's visitor economy, which currently represents £347 million economic impact annually, supporting 8,000 jobs, 7% of the city's employment.

Supported by the City Council, Destination Plymouth has worked with Blue Sail, specialist destination consultants, to help diagnose and address the opportunities/issues facing growth in the visitor sector, wider 'place marketing' challenges and to establish a clear direction for the future development of Plymouth as a destination.

To help define priorities, projects and assets that would help drive visitor growth, the refreshed Visitor Plan (see details below) has also been developed through a robust process of consultation. This has involved engaging over 50 stakeholders and businesses across the visitor economy. This has included the following organisations:

Plymouth Waterfront Partnership BID
Plymouth City Centre Company BID
Plymouth Growth Board
Hoe Neighbourhood Forum
Plymouth Culture
Real Ideas Organisation
Royal Navy
Plymouth University
Visit England
Heart of the South West LEP

For full list see appendix.

The refreshed Visitor Plan aims to:

- Set strategic high level ambitions for the city and our visitor economy
- Be clear about why people should visit Plymouth, and the experiences they will encounter
- Focus single-mindedly on those actions that will deliver the best return on investment
- Highlight enabling activities that reflect our strategic aims and focus our priorities

The Visitor Plan process has been endorsed by the Destination Plymouth Board, Plymouth Growth Board, Plymouth Waterfront Partnership and the Plymouth City Centre Company.

The Plymouth Visitor Plan 2020 to 2030 will provide a coherent, high-level framework for Destination Plymouth's detailed operational delivery plans, which will be developed later in 2019. This will include a business plan and a marketing and events plan. This will be about wisely committing resources - people, time, skills and budgets - to deliver the plan and importantly to seize opportunity, help nurture partnerships and lever in additional partner funding and sponsorship. The funding structure will involve aligning existing City Council resources behind the Visitor Plan; working closely with the private sector, whilst also securing grants, sponsorship and revenue.

Destination Plymouth, supported by the City Council, will ask everyone involved in the visitor economy to get behind this Plan support it and take a role in making it happen.

3.0 Our Current Position

The benchmark data for the Visitor Plan was initiated in 2008 and nearly 10 years later progress has been significant against the original objectives, with visitor numbers and spend targets achieved and many of the projects originally envisioned having been delivered or are in the process of delivery prior to Mayflower 400 in 2020 which has acted as a significant catalyst for the city.

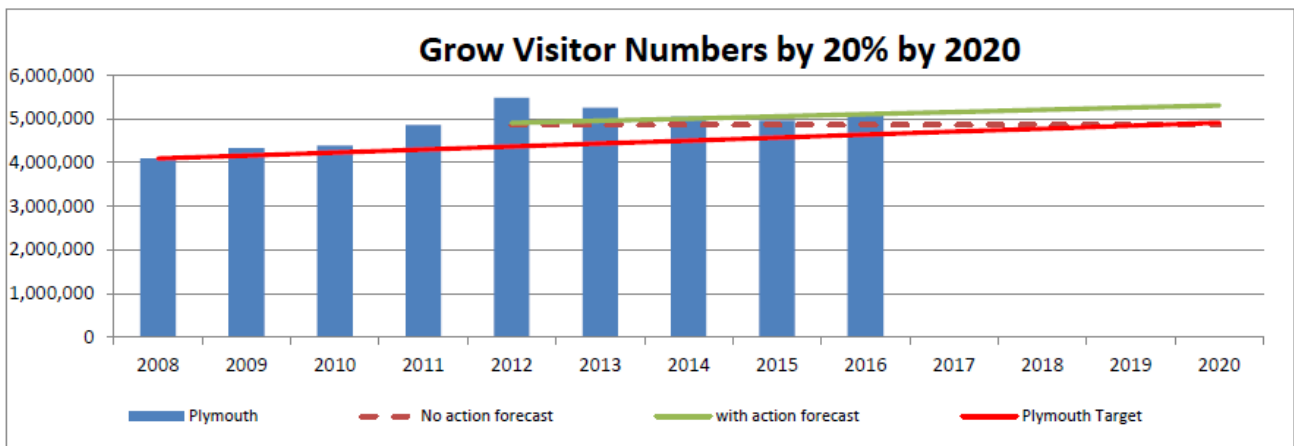
3.1 The key strategic objectives within the existing Visitor Plan are:

- To grow visitor numbers by 20% by 2020 and visitor spend by 25% - that means 800,000 additional visitors and that visitor spend will rise by £63m from nearly £252m to £315m
- To create and sustain 4,000 new jobs in the visitor economy by 2026 – a 33% increase on current numbers
- To increase GVA by £84.4 million
- To strengthen Plymouth's position as the regional centre for Devon & Cornwall – by creating a great day out and evening destination
- To raise the profile of Plymouth and its positioning as a place to visit and invest - particularly focusing on its outstanding marine credentials
- To generate demand for more places to eat and drink, distinctive independent shops, quality places to stay and an exceptional cultural offer that local people and visitors can enjoy

3.2 The achievements as a city compared to targets are significant, including:

Grow visitor numbers by 20%

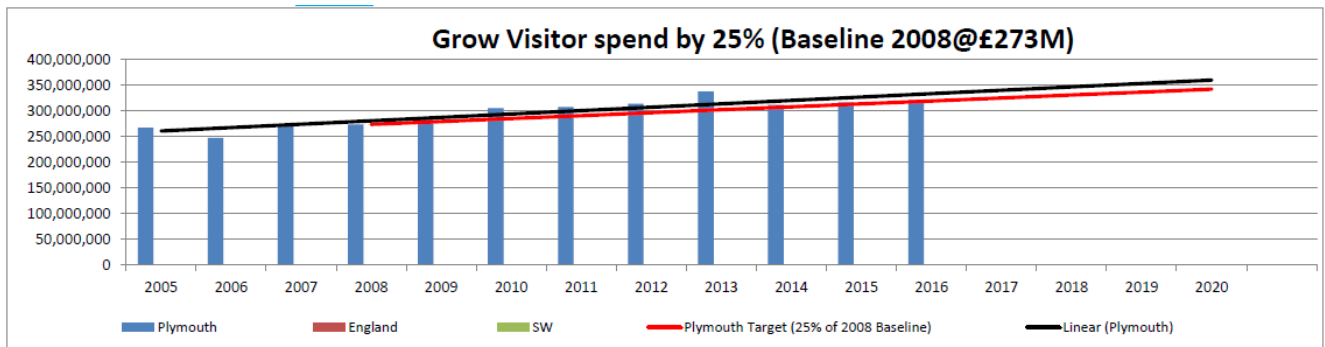
- Baseline (2008) = 4.093 million. Actual to 2016 = 5.116 million
- Plymouth has grown its visitor numbers by 24.9%



Grow visitor spend by 25%

- Baseline (2008) = £273,731,000. Actual to 2016 = £321,767,000
- Plymouth has grown its visitor spend by 17.5%

Key: 'Actual' figures are graphically represented by the blue coloured bars in above graph.



Grow jobs by 2,800

- Baseline (2008) = 4,495. Actual to 2016 = 7,649
- Plymouth has grown the number of jobs by 3,154

Grow GVA by £84 million

- Baseline (2008) = £208m. Actual = 248m (2016 latest figures)
- Plymouth has grown its GVA by £40m
- Anticipate future increase - as 4 years to go, including impact of projected new hotel capacity

Key: 'Actual' figures are graphically represented by the blue coloured bars in above graphs.

3.3 In addition, the original visitor plan included a five-year rolling business plan and marketing plan with the following headline actions and 'star projects'.

Star projects:

- A signature and major events programme to draw in day visitors from across the region
- Development of Commercial Wharf into a used public space
- Royal William Yard to be developed as a visitor destination
- 'Telling Stories' a project to develop and promote our heritage assets, public realm, gateways and city walking trails.

High-level headline actions:

- Destination marketing
- Accommodation development
- Visitor welcome
- Business tourism
- Skills development
- Evaluation and monitoring

3.4 Star projects have been particularly successful and have been largely delivered already or will be delivered by 2020:

Events – Plymouth now has a very strong events programme punctuated by nationally significant events including MTV Presents, British Fireworks, Armed Forces Day, FlavourFest, and key sporting events including Transat, La Solitaire du Figaro, British Diving Championships and British Swimming Masters. Plymouth Culture has grown from strength to strength over the past five years and in 2017 helped to enable NPO's across the city to bid for Arts Council Funding of over £18 million for four years to develop the underpinning cultural infrastructure of the city as we move towards 2020.

Commercial Wharf and Royal William Yard have both been successfully re-developed with the Commercial Wharf area now a thriving café and boat trips attraction led by private sector investment. Royal William Yard has been developed by Urban Splash and has become a chic mini-destination of offices, restaurants, cafes and bars in its own right, coupled with a quirky programme of artisan food markets, open air theatre and cinema amongst some of its regular activities and café culture.

The TIC and associated Mayflower Visitor Centre on the Barbican continue with a 3-storey museum with interactive displays about merchant life, the fishing industry and the harbour. There was a c. £15,000 refurbishment by the City Council in 2015. There has been a strong increase in visitor numbers over the last few years, potentially due to the current temporary closure of the city museum (ahead of the opening of The Box).

The 'Telling Stories' project has many facets and is currently in delivery with the aim of being completed by 2020. The project comprises three heritage trails, refurbishment of the Elizabethan House and reimagining of the public realm in the Mayflower Steps area through both physical and digital attributes. Linked into this will be the impressive 'The Box' project which will provide a step change in the visitor offer in the city and long overdue revitalisation of the former city museum, galleries and records offices.

3.5 The headline actions for marketing activities included targeting local and regional day trippers, developing staying and overnight visits, and focusing on the East coast of the USA as part of the build up to Mayflower 400 in 2020. As part of the initial work the Britain's Ocean City branding was developed and there has been significant success in growing the reach of the city's marketing activities helped by £1 million of Visit England and government grant funding over the past two years for Mayflower 400. This has resulted in the following improvements:

Website visits: 2013 - Unique visitors 616k; Page views 4.2m
2017 - Unique visitors 968k; Page views 5.3m

Social media:

Visit Plymouth - 2014 - Facebook 5.4k, Twitter 6.6k
2018 - Facebook 10.6k, Twitter 13.5k

What's On - 2014 - Facebook 31.7k, Twitter 1.4k
2018 - Facebook 60.4k, Twitter 6.1k

Impact:

AVE / Reach - 2013 – AVE - £2.1m; Reach: 118k
2017 – AVE - £2.7m; Reach 156k

US marketing activity – Audience reach £728 million (trade), £17 million (AVE) PR reach

In addition, work commenced in 2017 to develop the cruise market driven by long term aspiration to become a key cruise port in the South West and to grow cruise visits which had declined to zero over the years. Early activities in 2017 and 2018 have been successful with 4 cruise liners booked in 2018, 5 to date in 2019 and 6 to date in 2020.

3.6 A key area of activity in the original plan was to grow better quality and a wider range of accommodation bed stock to support growth in the staying and international visitor markets and to encourage visits from higher spending visitor groups.

A hotel demand study was commissioned in 2014 and demonstrated demand in the market; this was subsequently taken to market by the City Council later that year. Currently there are two hotels being built (Derry's Premier Inn (110 rooms), Coxsides Premier Inn) and a 14-bed boutique hotel has recently opened in Royal William Yard. A number of other hotel developments are in the pipeline and are in the process of being brought forward.

3.7 Visitor welcome activities have been predominantly driven by PCC and include continuing to support the tourist information centre in the Barbican, improving key gateways such as Bretonside coach station being moved to Mayflower Street, the railway station which is currently being brought forward as a major hub regeneration project, cruise terminal and key city gateways such as Exeter Street.

Tourism is one of the big success stories in Plymouth. Over the last decade tourism has seen visitor numbers and visitor spend each grow by over 20%. Around 5.1 million visitors make a trip to the city every year spending £347m. Today tourism employs over 8,000 people, 7% of the city's employment.

3.8 Funding

Destination Plymouth Ltd. currently receives £150,000 per annum from PCC, which is already within existing revenue budgets, as part of the overall Mayflower 400 contribution of £2.25 million from 2017 to March 2021.

Other income based on last year's figures is broken down as follows;

City Centre Company £50,000 per annum
Plymouth Waterfront Partnership £10,000 per annum
University of Plymouth £50,000 per annum
Memberships £17,000 per annum (net)
Marketing £20,182 per annum
Mayflower 400 £330,315
Discover England £343,000

Cruise £25,000
Total: c. £845,000

This income supports the executive team and delivery of key projects linked into specific grant funding including Discover England Fund and Mayflower 400.

3.9 Leverage:

As part of the overall partnership approach, PCC also contributes event and non-event specific income (totalling c. £0.93m in 2017/18) towards marketing and events activities via the economic development events and marketing team. This supports events such as Lord Mayors Day, Bonfire Night, Armed Forces Day, Ocean City Sounds, Fireworks, and the Blues n' Jazz Festival. The Destination Plymouth team is also hosted at City Council offices in Ballard House.

Grants funding has also successfully been secured over the past three years including:

2016	£500,000	Treasury funding via Visit England for MF400 International marketing
2017	£500,000	Discover England Grant funding for international marketing (+ £200,000 in kind)
2017	£88,000	Discover England Grant funding for cruise marketing
2018	£250,000	DCMS funding for MF400 international marketing
2018	£10,000	General Society of Mayflower descendants for MF400 trails/monument
2018	£60,000	Community Rail Partnership for MF400 trails
2018	£10,000	Pilgrim Trust for Elizabethan House
2018	£50,000	from Heritage England for Elizabethan House
2018	£140,000	from HLF for Elizabethan House (part of 2 stage grant of £650,000)
2018	£200,000	Founders Club for MF400 marketing activity
2018	£51,000	Plymouth Argyll Trust for MF400 sporting programme (in kind)
2018	£70,000	Arts Council for Cultural producer
2018	£68,000	Arts Council for Illuminate and misc. projects (in kind)
2019	£3.4 million	Cultural Development Fund
2019	£58,000	HLF for heritage trails

Total grant funding leveraged - 2016 to 2019 (to date) - £5.5 million.

It is worth highlighting that this represents significant leverage on City Council funding.

Behind these high-profile projects and activities, partners continue to work together to support investment to ensure that visitor facilities, service and experiences are in place to make Plymouth a successful destination. But there is more to do and more opportunities to deliver for our city and for our community.

Plymouth needs more high quality, distinctive and 'only here' products and experiences that provide a reason for visitors to choose our city for a short break or a business trip, and we need more visitor accommodation to make that possible. In a highly competitive marketplace we must be confident about our unique strengths and their potential. We must take our offer to market in standout and engaging ways, using the latest digital technology. Visitors need to be able to get here easily and find their way around the city with confidence. Over the next decade we need to invest in new product and experiences, in our infrastructure and in our marketing and promotion. All we do must be underpinned by sound sustainability credentials.

4.0 Our Vision

We've re-invigorated and refreshed our vision to take advantage of new opportunities and to reflect the marketplace.

Our refreshed vision is:

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

5.0 Our Ambitions:

Our previous plan set our ambition based on a ten-year trajectory with key milestones focused on a high point around the Mayflower 400 commemoration in 2020. This refreshed strategy sets out to maximise the legacy of Mayflower 400, the capital investments that have been delivered and to further grow the city's visitor economy sustainably up to 2030. Across the city our stakeholders have been consulted and have continued to express an appetite for continuing our growth trajectory through three high level ambitions:

- ***'We will be Devon and Cornwall's premier visitor destination'***
- ***'We will be known internationally for 'jaw dropping art', authentic cultural experiences and our urban spirit'***
- ***'Our national marine park will be globally recognised for amazing experiences by, on, in and under the ocean'***

Our ambitions are reflected in three key themes, which will lead our city narrative:

5.1 Our Blue-Green City

Plymouth is Britain's Ocean City, home to the UK's first national marine park and uniquely offers the opportunity for visitors to explore the ocean in exciting ways and to enjoy a city with a breath-taking open green waterfront edge that stretches for miles.

Plymouth is an ocean waterfront, a port and a harbour. The city has very strong marine credentials and a proud naval heritage. That is a unique suite of assets for a UK waterfront city. We need to do much more to deliver its visitor potential. That means delivering excellent waterfront experiences and making further investments to create new vibrant quarters along the waterfront, presenting our blue and green environment as a single offer and increasing the opportunities for visitors to enjoy being by, on, in and under the water.

By 2030 Plymouth will be known as the premier Marine Park in Europe, attracting visitors from across the globe to award-winning experiences that celebrate Plymouth's important marine work from research to its fishing industry.

Our sweeping open views will be instantly recognisable icons of Plymouth, the backdrop to our waterfront activity from beaches to water sports and cycling – where visitors and Plymothians enjoy the city together.

During consultation we have been testing concepts for projects which will underpin our key themes.

Emerging 'project' concepts include: the development of Plymouth's Waterfront as a great place for activities and experiences: by, on, in and under the water, including support to develop the Mount Batten Water Sports and Activities Centre. The creation of exciting new stories about being by, on, in and under the water, working with our local community as ambassadors and exploring the use of cutting edge digital and marine technology. Also, to explore how to develop the Sutton Harbour area to improve links for visitors to the proposed national marine park and the city's fishing industry.

5.2 Our Brilliant Culture

Plymouth is Britain's Ocean City – the sea defines the unique history of the city and has shaped its culture and its people over generations. Currently the cultural offer of Plymouth is not widely known or understood. That creates an opportunity to present a fresh perspective of Plymouth and to attract new visitors to the city that supports the waterfront theme as a form of 'après sea'.

Our aim is to be known as a city full of cultural surprises; the leading light in Devon & Cornwall for amazing events, creative visual contemporary arts, music, sport and for performance; known for nurturing and celebrating creative people and their ideas. Plymouth will be known for its engaging maritime heritage experiences from the Mayflower to its naval history. We will build on the success of Mayflower 400 to create more experiences and saleable products that will continue to attract international and UK visitors to Plymouth.

By 2030 Plymouth will be recognised as the cultural capital of Devon & Cornwall and as a place where everyone can enjoy and take part in engaging and accessible arts. Destination Plymouth, tourism businesses and arts organisations will work productively together to deliver that. We will continue to use events, festivals and significant celebration years to showcase what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show for 2021. During consultation we have been testing concepts for projects which will underpin our key themes.

Emerging 'project' concepts include: the potential of 'The Box', our new showcase cultural and heritage venue, to realise its potential by working with local creative talent and communities: to encourage new audiences to explore other heritage, arts and leisure activities in the city - using 'The Box' as a springboard. In addition, explore how to grow our music offer, to build a new distinctive evening offer that supports a varied evening and night-time economy. Also, to develop the potential of an exciting new 'visitor quarter' at Devonport, building on emerging plans for new interpretation and the visitor potential of the Guildhall and Oceansgate. Better water and land based visitor transport could improve access and be part of the experience.

5.3 Our Premier Destination

Our ambition is that by 2030 'We will be Devon and Cornwall's premier visitor destination, a top ten UK city break and known for our 'après sea'.

During consultation we have been testing concepts for projects which will underpin our key themes.

Emerging 'project' concepts include: the development of Plymouth as an 'urban base' through which to enjoy modern City Centre shopping, leisure and evening and night-time experience e.g. Drake Leisure, Royal William Yard and Millbay. All whilst acting as a gateway to Dartmoor National Park, two country parks at Saltram and Mount Edgcombe, two estuaries at the Plym and Tamar, together with stunning beaches, coastal and countryside walks.

6.0 Enablers

A successful visitor economy is reliant on delivering a range of services and facilities. Here are the main areas for focus to 2030.

i. Our Partnership

Destination Plymouth has been key to the success of our first visitor plan by leading and co-ordinating the partnership that has delivered robust outcomes over the last eight years.

This partnership unites public and private sector interests in its Board and through its approach to delivery, secures grants and commercial income to support destination marketing and operates a successful membership which brings together all of the businesses involved in tourism.

ii. Our People

Our people are vital to the success of the visitor economy.

Our community:

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

Our businesses:

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

Our team:

Our partnership is vital in helping us to succeed in our aims and, importantly, it is our people who will lead the way with a 'team Plymouth' approach: encouraging joint working, sharing best practice and embracing the shared narrative of our city.

iii. Our Ocean City Infrastructure

Plymouth will deliver an exciting sense of arrival for visitors arriving by sea, car, walking, cycling or by train and make the water a key part of the city's leisure transport system.

We will work with partners in the south west to promote and secure radical improvements to the quality and resilience of Plymouth's road, rail, air and sea connectivity. City partners will work together to deliver innovative and sustainable transport solutions using the water to reinforce Plymouth Britain's Ocean City, including park & float and improved ferry and small boat services that take visitors to different points along the city's coast.

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

We will use cutting edge digital technology to showcase the experiences that we have in the city and to enable our visitors to book joined up travel and to communicate live travel information. We will ensure visitors can find their way around Plymouth with confidence, encouraging them to explore further. We will improve the

signage and environment between the city centre and the waterfront to encourage a two-way flow of visitors to support longer stays and visitor spend across the city. We will create exciting interpretation and trails beside, in and on the water that are integral to our visitor experiences and improve the legibility of our city.

iv. Our Accommodation

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

We will create more hotels and support a diversified range of accommodation to enable growth in overnight trips from international and UK based leisure and business visitors. Our most recent hotel demand study, by Colliers International, demonstrates continued growth in occupancy levels (which are at 79% all year round), one of the highest of any regional city outside of London. There is ongoing demand for more capacity in the serviced sector and a particular interest in accommodation development in the four and five star categories.

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

v. Our Distinctive Brand

‘By 2030 Plymouth will be renowned as the #1 must do destination in Devon & Cornwall....’

Critical to a successful visitor economy is distinctive targeted marketing, promotion and PR. We will single-mindedly focus visitor marketing and promotion on the distinctive ‘only here’ aspects of the Plymouth experience, leading with our two themes of ‘Blue-Green city’ and ‘Brilliant culture’. We will work together to communicate consistent shared messages using the latest digital marketing technology across a range of platforms. This will ensure Plymouth Britain’s Ocean City mean’s something distinctive and appealing to target visitor markets.

To achieve the ambitious growth targets in the value of tourism, our UK target markets are high value leisure segments (Free & Easy Mini-Breakers and Aspirational Family Fun¹) who will stay longer and who reside along the Great Western corridor. It also includes business visitors and key international markets in the USA (E. coast) and near Europe attracted to our heritage stories including Mayflower and who are reached via the travel trade. We will maintain our share of day visitors through a diverse and engaging events calendar, which is marketed to these nearby audiences.

Who are they		What are they looking for	Why are they a priority
Day visitors			
Resident day trippers	Day trips from home within 60 minute drive	Shopping, food and drink, theatres, entertainment	85% of current visits are day visits – need to continue to attract
Regional day visitors	Day visits from within 90 min drive	As above plus attractions	As above
UK staying visitors			
Free and easy mini breakers	Young, free and single, average household income; able to indulge in a wealth of activities when on holiday, possibly due to their lack of children. ‘the average Joe’	Shopping, city breaks, museums and galleries, entertainment, attractions	Higher spending looking for experiences and mid week/weekend breaks, love culture, heritage and art
Aspirational family fun seekers	London/SE based high earners with children at home, regularly take city	City breaks, shopping, outdoor activities, coastal/rural fun,	Higher spending, love holidaying at home, love active outdoors and

¹ VisitEngland Market Segmentation <https://www.visitbritain.org/visitor-segmentation>

	breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits.	attractions, entertainment	things to do with the kids
Visiting friends and family	Friends and family visiting University students/armed forces/family	Food and drink, entertainment, shopping	40% of visitors are VFR, need to retain this segment
International staying			
Conservative retirees (USA, NL, Ger.)	A more mature segment best defined by their attitude, 'young at heart'. Greater freedom, money to spend and time to enjoy themselves, travel key pastime, desire new experiences and learning.	Time outdoors - walking Learning about local heritage & culture Trying a new activity / learning a skill Sampling local food	Very pro UK, higher spending, key interests, building on Mayflower activity
Mature experience seekers (USA, NL, Ger.)	Retired, financially secure travellers quest for new experiences. Seek laid back trips that allow them to relax, meet new people and see new parts of the world safely	Sightseeing Sampling local food Meeting new people Relaxing – not being rushed Nothing strenuous or physical	Pro UK, large segment, above average spend but like value for money
Business visitors			
Regional businesses (within 2 hour drive time)	Businesses wanting larger meeting, smaller conferences or events or incentive venues within a day or max 1 night stay	Value for money, easy access, good quality food, Wi-Fi, parking	Plymouth should be getting more market share in this sector
UK/International trade associations (USA, NL, Ger.,)	Specialist trade bodies and organisations looking for international standard meetings and small to medium conference venues or incentive travel	Link to vertical market sectors where possible e.g. marine, medical, manufacturing using 'word of mouth' or reputation as hook	High spending business visitors, key to drive off peak business and provides opportunities in leisure and inward investment

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

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

There needs to be a shift in media used to reach our markets and we must develop the very best social media platforms and websites that inspire visitors. We must identify and develop a relationship with the main influencers for our target markets including social media bloggers, vloggers and instagrammers as well as mainstream media and journalists. We need to turn visitors into our City Ambassadors by encouraging sharing of their visits online.

vi. Our Business and Conference Tourism

Plymouth is recognised for its strengths in marine science, defence, medical expertise and conservation; it has an outstanding University and academic institutions with creativity and high-quality research; it is on the mainline to London. These factors present opportunities for Plymouth to grow business and conference tourism. It is an important high spend market, concentrated at times of year when there are fewer leisure visits. It will deliver business to our hotels and places to eat and support the nighttime economy at times of year when there is capacity.

Our aim is to be a meetings hub for Devon and Cornwall businesses and to make Plymouth a competitive destination choice for national associations and specialist international conferences.

By 2030 we will have delivered further quality venues and accommodation to be a competitive business destination and, in particular, be a national leader in hosting marine conferences with a new flexi conferencing venue planned to grow into the next phase of growth.

To get there we need a proactive conference desk service that can attract new meetings and conference business into the city. More meetings and conferences will create demand for more hotels and venues, creating a confident environment for investment. It will ensure we fully deliver our potential as a marine city and support the status and growth of businesses. Business visitors to our city will be encouraged to come back again to enjoy some leisure time here and to bring their families and friends.

To fully realise potential we will explore the potential to create a new conference centre, a flexible space that can also be used for exhibitions and large music concerts.

7.0 How will we measure success?

Our targets are grounded in **wise growth of the value of the visitor economy and quality year round jobs for our local community**. We will focus on high value markets to drive GVA and productivity in the sector that can translate into quality, year-round jobs for Plymothians. That means increasing 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 volume of visits.

Our Targets

Our new targets are:

- To grow visitor spend by 30% from £328 million to £450 million
- To increase the total visitor numbers by 15% to 6 million by 2030

In order to deliver that growth we need to focus on three key market segments:

- **Make international tourism worth £60 million a year** spend in the city, that's 65% growth in a decade;
- **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.

What we do to attract and retain these markets will appeal to day visitors too and enrich the lives of local people by creating more quality leisure and cultural facilities and experiences. We will create an exciting dynamic environment for the visitor economy, which will create confidence in businesses to invest, providing jobs and driving up productivity. Delivering our refreshed Visitor Plan will generate a further 1,000 new jobs in the city, bringing employment in tourism to just under 9,000 jobs.**

**

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

11.0 Visitor Plan – Marketing and Business Plan

Destination Plymouth plans to continue to work with the City Council and Blue Sail to produce detailed operational marketing and business plans from 2021 to 2024, which will be reviewed, on a rolling annual basis. This work will be completed and brought back to Cabinet in December 2019. Given the wide-ranging and extensive nature of ongoing consultation and approvals it is anticipated that this work will take the rest of 2019 to complete. An outline timetable with proposed milestones is provided below.

Cabinet approval of high level aims – March 5th 2019

Scrutiny feedback on high level aims – March 6th 2019

Feedback high level aims to consultees w/c March 11th 2019

Feedback received and collated – end March 2019

First draft Marketing Plan – end June 2019

First draft Business Plan – end July 2019

Feedback to consultees – August 2019

Feedback received and collated – Sept 2019

Final drafts – Oct 2019

Present back to Cabinet – Dec 2019

12.0 Risk Assessment

There is a risk that Destination Plymouth will not secure sufficient resources to fully deliver the Visitor Plan. Should this occur there would be a need to review, reduce and prioritise activities within the Visitor Plan. For example, if income targets for marketing purposes from partners and commercial activity were not achieved, there would be a need to review and prioritise the marketing activity to maximise impact on the most important markets.

KEY RISKS

Include up to 5 depending on scale of project, copy and paste additional tables as required

Potential Risk Identified

Description:	Lack of funding for Destination Plymouth Ltd. post March 2021			
Mitigation:	Agree core funding from PCC, BIDS and key city partners by end 2019			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	4	2	4	20
Impact To be scored 1 (low) – 5 (high)	5	2	5	
Trend	Decreasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	

Potential Risk Identified

Description:	Reputation impact following Mayflower 400			
Mitigation:	Secure delivery and messaging for Mayflower 400 programme to key stakeholders			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	4	2	4	20
Impact To be scored 1 (low) – 5 (high)	5	2	5	
Trend	Increasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	

Potential Risk Identified				
Description:	Political support reduced due to change of administration			
Mitigation:	Cross party briefing and engagement through Visitor plan renewal process			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	4	2	4	20
Impact To be scored 1 (low) – 5 (high)	5	2	5	
Trend	Decreasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	
Potential Risk Identified				
Description:	Insufficient partner funds to implement Visitor Plan activities			
Mitigation:	High level of stakeholder engagement through initial consultation and Visitor plan development process			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	5	2	4	16
Impact To be scored 1 (low) – 5 (high)	5	2	4	
Trend	Decreasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	