

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

PLYMOUTH VISITOR PLAN - 2020-2030

REPORT FOR DESTINATION PLYMOUTH AND PLYMOUTH CITY COUNCIL

FEBRUARY, 2019

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1 INTRODUCTION

This Visitor Plan is a framework for Plymouth that describes at high-level what needs to happen to develop the city's visitor economy over the coming decade.

It will be underpinned by a detailed business plan and marketing plan which, combined with this Visitor Plan Framework, will provide the refreshed Plymouth Visitor Plan for 2020-30.

The direction of travel set out here has been built up over several months through a process of detailed analysis of available data and research, extensive engagement with stakeholders through workshops and meetings and guidance from the Destination Plymouth Board.

The Plan has looked at all the good work that has happened so far including the delivery of the original Visitor Plan for the city. It takes account of the market opportunities and trends affecting destinations. Much of that good work delivered through the previous plan has been a result of the strong partnership that exists between the private and public sector in Plymouth.

This Plan has been commissioned by Destination Plymouth but is a Visitor Plan is for all stakeholders with an interest and role to play in supporting the development of this vital part of the economy.

Destination Plymouth has a clear role in facilitating and co-ordinating many of the objectives and projects set out here. The organisation is well placed to secure funding to support projects having helped lever in over £2m of additional funding in the last few years to support destination marketing. But many of the projects in this plan also require capital funding. That means the support and interest of a wide range of private and public investors must also be secured.

In the pages that follow you will find a vision, headline ambitions and objectives. The Plan is built around two main development themes and for each we set out 'Star Projects' – projects that will make a very significant difference to tourism in Plymouth. We also set out a 'Enabling Actions' to strengthen the foundations for the ongoing success of tourism.

2 WHERE WE ARE NOW

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 is 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, building on the success of our successful collaboration in the tourism sector.

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%. Over 5 million visitors make a trip to the city every year spending £347m. Today tourism employs over 8,000 people¹.

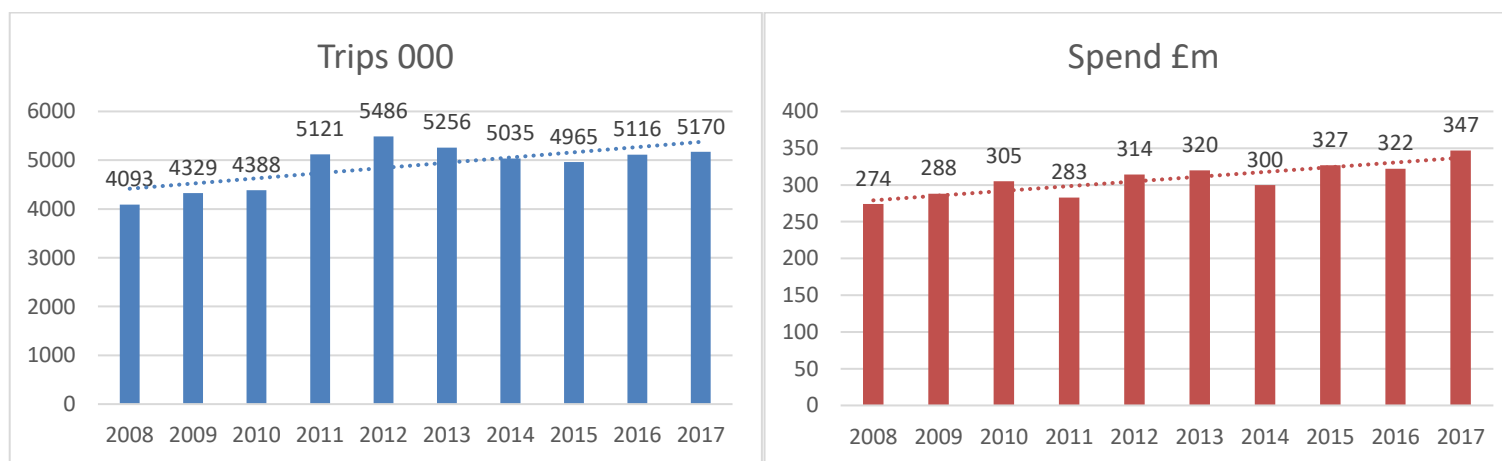


Figure 1 2008-2017 Day & Overnight Trips and Visitor Spend in Plymouth

¹ Cambridge Model actuals 2017

Our achievements have been marked by some high-profile tourism projects. Mayflower 400 has put Plymouth firmly on the global stage, targeting US visitors and working with national and regional partners to ensure that our city benefits from the high value spend of international visitors and that we celebrate our spectacular waterfront and its history. We've made big investments in culture leading with The Box, the city's new cultural centrepiece, and by delivering exciting major events from the America's Cup coming to Plymouth in 2011 to the British Art Show coming to Plymouth in 2021. Together all these projects are ensuring that tourism delivers profile, economic benefit and new, quality facilities for local people.

Behind these high-profile projects, 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.

85% of visitors to Plymouth are on a day trip. To significantly improve the productivity of tourism and deliver a sustainable tourism sector for the future, we need to focus on growing the higher value markets. That means UK short breaks, international leisure visitors (building on the profile created through Mayflower 400), and business and conference tourism.

Plymouth needs more high quality, distinctive '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 stand-out 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.

3 WHERE WE WANT TO BE

We've refreshed our vision to take advantage of new opportunities and the current marketplace.

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

AMBITIONS

Our strategic ambition statements are:

- ▶ *'Our national marine park will be globally recognised for amazing experiences, by, on, in and under the ocean...'*
- ▶ *'We will be known internationally for jaw dropping art, authentic cultural experiences and our urban spirit..'*
- ▶ *'We will have transport infrastructure to match our ambition, with seamless connectivity to international arrival hubs and be known for our water transport services...'*
- ▶ *'We will be recognised nationally as best in class for our digital, creative and cultural approach in everything we do...'*
- ▶ *'Plymouth will be known nationally as a UK top ten city break...'*
- ▶ *'We will be renowned as the #1 must do destination in Devon & Cornwall...'*
- ▶ *'We will be known as the destination of choice for meetings, events and conferences in Devon and Cornwall....'*

OBJECTIVES

Our objectives are grounded in **wise growth of the value of the visitor economy**. We will focus on high value markets to drive productivity in the sector that can translate into quality, year-round jobs 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.

We will continue to **focus on three themes: our blue-green city, our brilliant culture and our premier destination** (a cultural base to explore the world class natural environment on our doorstep) to attract these leisure markets because these themes are special to Plymouth. Our waterfront and our culture are part of the DNA and 'urban spirit' of the city and have shaped our place and our people over generations and continue to do so today. That means we will deliver original experiences that visitors and local people alike will want to enjoy. This focus builds on the success of the original Visitor Plan and the investment made to date.

Delivering our refreshed Visitor Plan will generate a further **1,000 new jobs in the city**, bringing employment in tourism to just over 9,000 jobs².

What we do to attract and retain these markets will appeal to day visitors too and enrich the lives of our local communities 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.

Our targets are:

- ▶ To grow visitor spend by 30% from £347 million to £450 million in a decade
- ▶ To increase the total visitor numbers by 15% from 5.1 to 6 million by 2030

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

² Actual jobs, using Cambridge data and assuming c.14% increase in jobs between 2020 and 2030.

4 OUR THEMES

OUR BLUE-GREEN CITY

'Our national marine park will be globally recognised for amazing experiences, by, on, in and under the ocean...'

Plymouth is Britain's Ocean City, home to the UK's first national marine park uniquely offering 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 water-based experiences and making further investments to create new vibrant quarters along the waterfront, presenting our blue and green environment as a single offer and increasing the opportunities for visitors to enjoy being by, on, in and under the water. This reinforces the strength of our green spaces, our parks, which cover forty per cent of Plymouth; complemented by our two country parks and Dartmoor National Park.

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.

Emerging project concepts include:

- ▶ 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
- ▶ Exploring how to develop the Sutton Harbour area to improve links for visitors to the proposed national marine park and to the city's fishing industry.

OUR BRILLIANT CULTURE

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

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. Mayflower 400 and 'The Box' project creates an opportunity to present a fresh perspective of Plymouth and to attract new visitors to the city that supports the blue-green theme as an exciting 'après sea' experience.

Our aim is to be known as a city full of cultural surprises; a leading light nationally for creative visual contemporary arts and for performance; known for nurturing and celebrating creative people and their ideas. Plymouth will be known for its 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 nationally 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 creative and arts organisations will work productively together to deliver that. We will continue to use events, festivals, sport and significant celebration years to showcase what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show for 2021. **We will be recognised nationally as best in class for our digital, creative and cultural approach in everything we do.**

Emerging 'project' concepts include:

- ▶ Realising the potential of 'The Box', our new showcase cultural and heritage venue, 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
- ▶ Exploring how to grow our music, to build a new distinctive evening offer that supports a varied evening and night-time economy
- ▶ Developing 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.

OUR PREMIER DESTINATION

Our ambition is that by 2030 ***'We will be Devon and Cornwall's premier visitor destination and a top ten UK city break.'***

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

Emerging 'project' concepts include:

- ▶ Positioning Plymouth as an 'urban base' through which to enjoy modern city centre shopping, leisure and evening and night-time experiences e.g. Drake Leisure, Royal William Yard and Millbay
- ▶ Developing and promoting Plymouth as a gateway to our national parks, rivers, beaches, and coastal and countryside walks makes Plymouth a strong base to stay to combine activity and culture.

5 ENABLERS

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

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.

OUR PEOPLE

Our community

The visitor sector enables Plymouth's residents to benefit 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.

OUR INFRASTRUCTURE

'We will have transport infrastructure to match our ambition, with seamless connectivity to international arrival hubs and be known for our water transport services...'

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

We will work with partners in the south west to promote and secure radical improvements to the quality and resilience of Plymouth's road, rail 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 signing and environment between the city centre and the waterfront to encourage a two-way flow of visitors to support longer stays and visitor spend across the city. We will create exciting interpretation and trails along the waterfront and on the water that are integral to our visitor experiences and improve the legibility of our city.

OUR ACCOMMODATION

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

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

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 watersports enthusiasts.

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

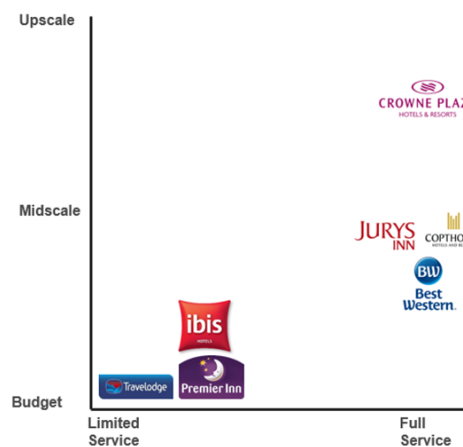


Figure 2 Existing Hotel Supply Brands. Source: Colliers International

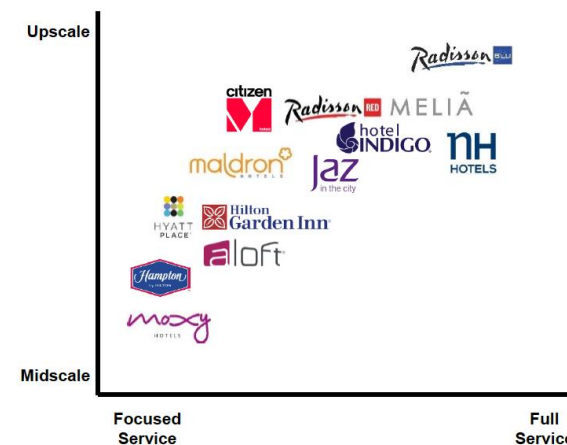


Figure 3 Potential Hotel Brands. Source: Colliers International

OUR DISTINCTIVE BRAND

'We 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 three themes of blue-green city, brilliant culture and premier destination. We will work together to communicate consistent shared messages using the latest digital marketing technology across a range of platforms. This will ensure Plymouth Britain's Ocean City mean's something distinctive and appealing to target visitor markets.

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

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

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

OUR TARGET MARKETS

We recognise that the viability of our city centre, in particular our shopping experiences, rely on us continuing to deliver for our local and regional visitors. However, if we want to grow the value of the visitor economy in a sustainable way and improve the productivity of the sector, we need to focus on attracting higher spending segments who are likely to enjoy what the city has to offer, in particular people who have previously visited the city and are therefore warm prospects.

To achieve the ambitious growth targets in the value of tourism, our target markets are high value leisure segments (Free & Easy Mini-Breakers and Aspirational Family Fun³) who want the water activity, cultural and heritage experience that Plymouth offers. They are segments that will stay here longer and who live along the Great Western rail corridor.

Our international markets are visitors from the East Coast of USA and Near Europe attracted to our heritage stories, including Mayflower. We will reach them via the travel trade. Some of them may be visiting as part of a UK/European cruise ship experience.

We will maintain our share of day visitors and use targeted promotion, for example our diverse and engaging events calendar to continue to attract them.

OUR BUSINESS AND CONFERENCE TOURISM

'We will be known as the destination of choice for meetings, events and conferences in Devon and Cornwall....'

Plymouth is recognised internationally for its role in marine science, defence, medical 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 night time 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 quality venues and accommodation to be a competitive business destination and be a national leader in hosting marine conferences with a new flexi conferencing venue planned to grow into the next phase of growth.

³ VisitEngland Market Segmentation <https://www.visitbritain.org/visitor-segmentation>

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 the potential we will explore the long term potential to create a new conference centre, a flexible space that can also be used for exhibitions, indoor sports events and large music concerts.

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is delivered in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance