SOUTHAMPTON’S
DESTINATION MANAGEMENT PLAN
2021-2031

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Southampton's Destination Management Plan 2021-2031

Executive Summary

Our 10-year vision is to develop tourism in Southampton to deliver exceptional experiences and transform people's perceptions of our culturally diverse and vibrant city. Southampton will be known as a welcoming cultural destination, captivating cruise visitors, growing conferences and drawing on our stories to create memorable experiences for visitors and communities.

Our strategic aims are to:
- Recognise the economic and social value of tourism, and develop this sector sustainably
- Enhance Southampton's reputation and image as a thriving city and destination

Our strategy has been developed during the Covid-19 pandemic, Brexit and the climate emergency. It looks to a future where Southampton can prosper in a sustainable, responsible manner, building on its strong asset base and current momentum. There is also a strong sense of invigorated collaboration and our UK City of Culture bid is creating a mood of optimism and confidence that this strategy will build on for the long term.

Prior to Covid-19, the city was performing well, though without strategy, coordination or adequate resourcing. Strong accommodation occupancies, healthy footfall in its retail heart, good attendances at cultural and sporting events and a regular supply of cruise passengers, staying in the city before or after their cruise or visiting for the day. There were concerns that not enough cruise passengers were choosing to experience Southampton, visitation to its daytime attractions could be higher and the city welcome significantly improved.

Overall, visitors have been coming to the city to shop, go to a show or concert, depart on a cruise ship or attend a meeting rather than to visit as a desirable destination. Southampton should be better known for its important heritage, its cultural activities and its city atmosphere. Whilst the neighbouring destinations are a key part of our attraction, Southampton is more than a base for visiting the New Forest or the Isle of Wight or embarking on a cruise.

Our key visitor products are:

- Discovery and Enrichment – our museums and galleries, medieval heritage and historic parks, our events programme
- Performance – for sport, theatre, concerts and events
- Social Fun – food, drink, nightlife and shopping
- Business – a national/international centre for marine events and academic/research specialisms
- Cruise – Europe and the UK's pre-eminent cruise port

These products already attract large numbers of people who stay in our hotels and apartments, visit our theatres, galleries, museums and shops and leave and depart from our city. We will find ways of encouraging them to stay longer, enjoy more of what we have to offer and return, sharing their experiences of visiting Southampton. As well as developing our existing markets, we will increase our appeal to city breakers and culture hungry visitors.

We have lots to offer, with recent investment in key attractions and facilities, a strong retail centre, great theatre, our universities, our parks and open spaces and a varied events programme.

However, we also have work to do:

- Our city gateways are underwhelming. We need to improve how visitors navigate the city and add to the critical mass of attractions, events and facilities for tourists and residents.

- We need to animate and enliven our heritage, reveal our stories for local people and visitors alike.

- We need to come together with one voice that can speak for tourism, harnessing the ability, resources and interests of the whole city.

- Using this one voice we will present a clear, coherent and consistent image to the rest of the country and the world.

- We need to 'raise our game' in attracting major conferences and events, working together and adding facilities where necessary.

- We will need to recover and respond to the significant impact of the pandemic on our visitor economy, supply chain and wider city.

- Above all, we need to 'think tourism' and place visitors at the heart of key decisions for major projects, including the proposed Mayflower Quarter.

Our strategy will be delivered in three distinct phases to ensure that we build a sustainable, credible and collaborative destination:

- Phase 1: Recovery and Foundations (2021-2024)
  The plan will focus on recovering from the Covid-19 pandemic, developing capacity and the Destination Management Organisation (DMO) structure/partnership, bidding for UK City of Culture and delivering quick-win projects

- Phase 2: Development and Stability (2024-2027)
  We will consolidate our partnerships, deliver UK City of Culture and its legacy, and enhance our delivery and activities

- Phase 3: Sustainable Regeneration (2027-2030)
  Towards the plan's end we will focus on building on the UK City of Culture legacy and developing new products and markets, with an agreed and sustainable delivery model

The strategy will deliver the vision by focussing on four main objectives:

1. Developing a distinctive destination
   Creating/enhancing visitor facing products: heritage, culture and conference facilities/events- increasing our appeal for discretionary visitors

2. Transforming the awareness and perceptions of our city
   Dramatically improving the brand, and marketing the city by working together with a consistent, joined-up approach and clear message

3. Creating a visitor-focussed city
   Putting tourism at the heart of our approach, improving the wider city offer and enhancing visitor welcome through physical improvements and investing in our people

4. Working in partnership more effectively
   Creating a strong voice for tourism and an effective delivery mechanism through working together. Making the most of our existing strengths and plugging the current gaps

1. Introduction

This Destination Management Plan (DMP) provides a galvanising opportunity to build a better and more productive tourism sector for Southampton. This plan has been developed during a global pandemic, the EU/Brexit transition and the climate emergency. This has resulted in a period of considerable uncertainty with significant social, economic and environmental challenges for all partners and stakeholders. It sits therefore, within the context of emerging economic, environmental and cultural responses and strategies and international ambitions.

The Covid-19 pandemic has hugely impacted the hospitality, tourism, cruise and cultural sector. While the nature and scale of recovery of tourism remains uncertain and we will need to be flexible, this plan represents an exciting opportunity for Southampton to build and grow its visitor economy. Pre-Covid-19, our approach is likely to have been different in terms of structural arrangements, and the resources that we might have been able to draw upon larger. The unfortunate reality is that each destination across the country is having to review the sustainability of current approaches; Southampton is seizing the opportunity to shape its response to deliver sustainable regeneration and change.

For tourism to recover and develop in this city, we will need to demonstrate strong collective leadership, mobilising around a shared vision and a realistic but stretching action plan, so that we can bring about the change and benefits we need and want for Southampton.

This requires us to be multi-faceted in our approach – that is to invest in and build upon the good work that is being delivered, find ways to address the gaps, and more effectively pool resources as we develop the tourism sector and realise our ambitions for Southampton.

As a city we face long-standing challenges that need to be tackled collectively. Southampton's visitor offer is not well understood. It has some great strengths, but we do not present a clear or coherent narrative to visitors. We have no flagship attractors, though we have some high-quality offerings and others that have yet to reach their potential. Our audiences are not necessarily visiting because it is Southampton, but because what they want or need to do is here e.g. a cruise, shopping or a meeting. Visitors from outside our region know little about our assets or experiences, and international visitors have no grasp of the richness of our heritage and our stories and the disconnect with our waterfront is a disappointment.

But we have huge opportunities on which to build: our bid to become UK City of Culture (UKCoC) in 2025; our important cultural (including heritage) mix; our public and green spaces; our pre-eminence as a cruise centre and our academic and sector specialisms. On our doorstep we have very popular destinations such as the New Forest, Isle of Wight, Bournemouth, Portsmouth and Winchester, which draw many visitors to the region.

Our 10-year vision is to develop tourism in Southampton to deliver exceptional experiences and transform people's perceptions of our culturally diverse and vibrant city. Southampton will be known as a welcoming cultural destination, captivating cruise visitors, growing conferences and drawing on our stories to create memorable experiences for visitors and communities.

The strategy will deliver this vision by focussing on four main priorities:

- Developing a distinctive destination;
- Transforming the awareness and perceptions of our city;
- Creating a visitor focussed city;
- Working in partnership more effectively.

2. The Current Situation

2.1 The Impacts and Benefits of Tourism

Our visitors come in many guises. They could be a cruise passenger staying overnight before embarking; someone coming because they have work, business or a meeting in Southampton; an international academic coming for a conference; a football fan going to the Saints; a family visiting a museum or gallery or park; someone visiting for a shopping trip or for a night out with friends, or parents visiting their student children.

These visitors impact on our city in many ways but, by the same token, our city can impact on our visitors – from our image, ease of booking, transport links, parking, shopping, attractions, theatres and events, bars, hotels, street cleanliness and welcome. Visitors take these experiences away with them and share them with others - the positive, and the negative.

Tourism brings significant benefits to our city. In 2019, tourism generated an estimated £422 million of direct expenditure to our economy. This supported a total of 7,720 Full time Job Equivalents (FTEs) including indirect and induced jobs.

The Economic Impact of Tourism to Southampton – 2019				
	Trips ('000)	Nights ('000)	Spend (£'000)	% overnight trips
Overnight Visits – by purpose				
Holiday	238	699	42,845	42.3%
Business	163	526	53,084	29.0%
Visits to friends/relatives	121	565	23,738	21.5%
Other	37	132	3,063	6.6%
Study	4	84	5,726	0.7%
Overnight Visits – by Origin				
UK	455	1,236	74,501	80.8%
Overseas	108	769	53,955	19.2%
Overnight visit – total	**563**	**2,005**	**128,456**	
Day Visits	**7,710**		**293,630**	
Total Visits	**8,273**		**422,086**	

Source: The Economic Impact of Tourism in Southampton 2019 – Tourism South East (2020)

This expenditure spreads far and wide into our local economy; from direct spend on retail, entertainment and hospitality, through the supply chain and - via the people employed in the tourism sector - into numerous other areas. Because visitors bring new money into the city, the overall size of the local economy benefits and grows.

Tourism can also:

- Support a range of jobs with a range of skills and entry requirements
- Enhance our image and profile – not just as a place to visit but also as a place to move to, invest in, or study
- Develop a sense of place and pride among our communities and residents

- Support a wide range of facilities that enhance the quality of life for our residents. This can include supporting shops, restaurants, galleries, theatres, attractions, walks and trails, events and festivals

2.2 Visitor Offer and Product Themes

There are 22 city centre hotels with approximately 2,300 rooms. These range from budget hotels to 4* and 5* brands. In addition, there are a further 16 hotels in the surrounding M27 Corridor, which have a total of approximately 1,600 letting bedrooms. This hotel supply comprises a mix of budget and 3* and 4* hotels. Additionally, planning permission has been given for two new 150 room hotels and 80 serviced hotel apartments as part of the Leisure World development. There is an opportunity to look at the quality of the provision and how the mix and type can better meet market needs. Similarly, with the impact of the pandemic, hoteliers may need to look at alternative markets and approaches, particularly given reliance on cruise and business markets.

The following table outlines a series of the primary potential experiences for Southampton and its offer in each of these.

Experiences	Our Product
Cruise - comprises outbound visitors (staying in Southampton pre/post cruise) and transit call passenger excursions	• Strong outbound (overnight) demand, particularly in some hotels • The draw for excursions (inbound visits) links to other themes – particularly 'discovery' (see below)
Surrounding destinations and product	• Paulton's Park, Isle of Wight (and associated events – Festival, Cowes Week), Winchester, New Forest and Portsmouth
Performance - includes visiting Southampton for theatre, concert, show, or a watching a sporting event	• Mayflower Theatre, MAST Studios • O2 Guildhall, Turner Sims and concerts at St Mary's Stadium • Events – e.g. Let's Rock Southampton, Mela • Match days at SAFC and internationals at the Ageas Bowl (Eastleigh)
Social fun - fun trip with a group of friends	• Food, drink and nightlife • Retail
Discovery and enrichment - sub-themes include heritage and cultural attractions, stories, tours and trails	• Attractions including for example: SeaCity Museum, Southampton City Art Gallery, Tudor House Museum and Gardens, John Hansard Gallery, Solent Showcase Gallery, Steamship Shieldhall and Solent Sky Museum • Medieval/Middle Ages Heritage/ Town Walls • See Southampton guides, Southampton Tourist Guides Association and Trails (e.g. Walk the Walls, Titanic Trail, Jane Austen Trail) • Events – e.g. Southampton Mela, Southampton Pride, Southampton Film Week

Business - including conferences and exhibitions	• Key events include Southampton International Boat Show, Sea Work, Marine Autonomy and Technology Showcase and Ocean Business • Venues include the National Oceanography Centre (NOC), Grand Harbour Hotel, SAFC and Solent Conference Centre
Occasion / celebration - an event specific to a visitor/family – e.g. graduation, weddings	• Large (~50,000) student population driving VFR, graduations • Weddings (albeit primarily driven by the local population)
Family fun - time out with the kids	• Attractions (as above) e.g. SeaCity Museum, Solent Sky Museum, Steamship Shieldhall • Surrounding area – especially Peppa Pig World at Paulton's Park
Romance/Luxury/Pampering Time with partner (or a close friend) but with a focus on treating yourself	• Southampton Harbour Hotel and Spa, Leonardo Royal Southampton Grand Harbour, Pig in the Wall • Shopping (see above) • Restaurants (see above)
Active - outdoor and fitness related activities	• Events – ABP Southampton Marathon (~10k attendance), Let's Ride, Southampton Sporterium • Alpine Snowsports, Southampton Water Activities Centre

2.3 Markets

In terms of our overnight markets, these include key midweek markets:

- Cruise passengers - between April and October and particularly for 4/5* hotels
- Corporate business travellers – year-round (especially 3* hotels)

Other midweek markets for our hotels include residential, delegates (for Southampton Boat Show and Ocean Business, Seawork and CLIA conferences), University Graduations, contractors, cruise ship crews, and group tours and midweek breaks (for Peppa Pig World, Isle of Wight and New Forest).

Our main weekend markets are:

- Cruise passengers – these typically account for at least half of weekend occupancy
- Weekend breakers – key drivers are Peppa Pig World, the Isle of Wight and New Forest

Other minor weekend markets are football, stag/hen, group tours, weddings/family markets, VFR, and cruise ship crews.

For day trips, retail is a key driver, and theatre and concerts are also a strong pull from our regional catchment area.

3. Strengths, Opportunities and Challenges for Tourism

We have strengths, some challenges but also exciting opportunities for developing tourism.

3.1 Our Strengths

- **A strong performing destination** – it is estimated that tourism in Southampton generates £422m of spend and supports 7,700 jobs and our hotel occupancies and rates are good.
- **Southampton is the UK's No. 1 Cruise city and Europe's largest cruise port** – this brings profile, prestige, and business. The pre- and post-cruise trip stays are very important to our hotel sector (though it may be a potential vulnerability). However, our excursions market is less well developed.
- **Performance, sporting (and business) venues** – there are strong 'performance' venues like the Mayflower Theatre and SAFC that generate some overnight trade.
- **Recent investment** – our tourism offer has seen recent investment – e.g. the Cultural Quarter, Mayflower Theatre and new hotels (the Moxy and Harbour Hotel) – and there is significant developer interest in new hotel developments.
- **Universities** – our two Universities are important in tourism terms. They drive VFR trips (graduations etc) but also (and importantly) conferences through their research specialisms. They are also key conference venues and can help to create a sense of dynamism and innovation in the city through their research and national and international profile
- **Committed organisations** – there are a number of key players proactive in the tourism sector – e.g. GO! Southampton, Destination Southampton, the Hoteliers Association, Business South, and See Southampton, Southampton Tourist Guides Association and teams of volunteers supporting attractions and welcoming visitors. Others are keen to be involved (e.g. the Chambers of Commerce). Hampshire County Council/Visit Hampshire, Southampton City Council and Solent LEP are all committed to the sector and will need to be appropriately deployed, if required.
- **Strong surrounding destinations** – e.g. the Isle of Wight, New Forest, Paulton's Park that generate trips to Southampton.
- Established **MICE (meetings, incentives, conferencing, exhibitions) and leisure events** like the Boat Show, Sea Work, and Ocean Business.

3.2 Our Challenges

- **A lack of Unique Selling Points (USPs)** – we do not have a distinctive product, profile or icon in tourism terms.
- **Critical mass** - there is limited critical mass to our offer, and we are perceived by the market to be a less compelling destination to visit than our potential competitors.
- **A lack of discretionary markets -** generally people are choosing not to visit Southampton because it is Southampton but because there is something else here – a show, a cruise, a meeting.
- **City Gateways** - the quality of the arrival experience (via train, coach, port terminals, road) needs to be significantly improved, including building a sense of excitement and anticipation about what visitors might see, do and enjoy in the city. This will also help to build local pride in the city as residents see positive imagery and activities about their city.

- **Urban realm** - our urban realm is a challenge with a lack of sense of place, and poor connectivity between different areas of visitor interest. The lack of an accessible waterfront is a major weakness.
- **Legibility and access** - the city is not easy to navigate for visitors and accessing it is seen as a particular challenge for cruise visitors. It can also be a challenging city to navigate for people with mobility requirements including those with wheelchairs, push chairs and suitcases. Equally there are opportunities to ensure that the city's diverse stories and communities are represented in our products and the welcome to visitors from across the UK and the world.
- **Partnership voice** - while the number of committed organisations is a strength, it is also a challenge. Various organisations are delivering parts of a tourism agenda currently, but there is no single organisation owning and leading tourism.

3.3 Opportunities

- **UK City of Culture (UKCoC)** – whether we win or not, the UKCoC bid is an opportunity to galvanise our offer, partnerships and transform our profile utilising our partnerships, assets and people including our civic leaders such as the Mayor.
- **Cruise** - the cruise market is an opportunity – both lengthening the stay pre or post, and growing the excursions market, supported by a 5th major cruise terminal opening in summer 2021.
- **Heritage Assets** – we have some strong heritage assets – e.g. our walls and vaults, maritime and aviation heritage - and unique stories including around transmigration and as a city of sanctuary and gateway to the world. From a visitor perspective, there are opportunities to utilise these more, and also to develop resonant products to culturally diverse audiences.
- **Economic growth** - the growth of the city in economic and population terms will create opportunities for day visits and business visits. Our sector specialisms and research will create opportunities for business tourism and conferences that could be developed.
- **Marine -** as a maritime centre and the base for the UK's largest marine event, the potential exists for further leisure and business events and to be seen as a national centre for water-based activities.
- **Mayflower Quarter and infrastructure** - the Mayflower Quarter proposals aim to transform our urban realm and connect it more strongly to the waterfront. There will be tourism opportunities particularly in relation to Mayflower Park, as well as creating a more accessible and navigable city. This will be supported by work to transform key city routes and the Central Station which will begin in earnest in 2021 and be completed in 2023.
- **New hotel development and investment** - recent announcements around Leisure World and the Bargate development bring with them the prospect of two new 150-bedroom hotels, 80 serviced hotel apartments as well as new restaurants, cinema, casino and retail and green spaces creating over 1000 new jobs. These will bring opportunities to increase capacity and potentially the generation of their own markets.
- **Green Spaces** - utilising our parks as spaces and potential event venues subject to environmental and neighbourhood sustainability, supported by ambitions to secure Green Flag awards as a benchmark for good management and public access.
- **Inclusion and access** – there are opportunities to develop new products that draw on the city's own culturally diverse populations and have appeal for national and international audiences. Considerations also around being a child-friendly and dementia-friendly city would also add to Southampton's appeal as a welcoming, thoughtful destination.

3.4 Covid-19 Impact

The Covid-19 pandemic has hugely impacted the hospitality, tourism, cruise and cultural sector in the immediate term, and the long-term implications remain uncertain. With over 80% of tourism businesses closed compared to just 24% of all businesses; 75% of employees furloughed compared to 27% of all employees and revenue down by 73% for accommodation in 2020, tourism will open later and operate under restricted capacity for months to come. Combined revenue (inbound and outbound) decreased by £79.7bn (equivalent to a potential loss of over 1.2m FTE jobs)[1].

It is estimated by VisitEngland that there was a 48% drop in domestic tourism in 2020, and that international visits are unlikely to return to pre-pandemic levels before 2023. Whereas Oxford Economics believes that domestic tourism will return to 2019 levels by 2022, and inbound overseas level will not return to 2019 levels until 2024.[2]

Meanwhile in March 2021, DCMS launched a review to assess how Destination Management Organisations (DMOs) are funded, structured and perform their roles, in order to establish whether there is a more efficient and effective model for supporting English tourism at the regional level.

Whilst the rollout of the vaccine programme is positive news, and government support has been made available through local authorities, the wider visitor economy will continue to need local, regional and national support as it seeks to reassure visitors, rebuild markets and continue to adapt and develop sustainable business models.

4. The Strategy

4.1 Vision

Our 10-year vision is to develop tourism in Southampton to deliver exceptional experiences and transform people's perceptions of our culturally diverse and vibrant city. Southampton will be known as a welcoming cultural destination, captivating our cruise visitors, growing conferences and drawing on our stories to create memorable experiences for visitors and communities.

4.2 Aims and Objectives

Our strategic aims are to:

- Recognise the economic and social value of tourism, and develop this sector sustainably
- Enhance Southampton's reputation and image as a thriving city and destination

This will be achieved through the delivery of four objectives:

1. Developing a distinctive destination – stronger visitor-facing products
2. Transforming the awareness and perceptions of our city – the brand and marketing the city
3. Creating a visitor-focussed city – the wider city offer and visitor welcome
4. Working in partnership more effectively – a strong voice for tourism and an effective delivery mechanism

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[1] Tourism Alliance presentation February 2021

[2] https://resources.oxfordeconomics.com/hubfs/Global-Travel-Service-July-2020.pdf

4.3 Strategic Drivers

A number of strategic drivers underpin our aims and objectives:

- **Partnership and the wider agenda** – tourism in Southampton does not exist in isolation. To be successful and contribute to the wider economy and as a cultural destination, the delivery of this plan will need to be undertaken in partnership with a range of public and private sector organisations and utilising our partnerships, assets and people including our civic leaders, such as the Mayor, to promote the destination. Both tourism and non-tourism bodies within Southampton as well as our partners in the wider Hampshire/Solent sub-region, reaching out nationally and internationally.

- **Incremental development** – the DMP will be delivered and developed in three broad phases that reflect the reality of the challenges we face:

    - Phase 1: Recovery and Foundations (2021-2024)
      The plan will focus on recovering from the Covid-19 pandemic, developing capacity and the DMO structure/partnership, bidding for UK City of Culture, delivering quick-win projects
    - Phase 2: Development and Stability (2024-2027)
      We will consolidate our partnerships, deliver UK City of Culture and its legacy, and enhance our delivery and activities
    - Phase 3: Sustainable Regeneration (2027-2030)
      Towards the plan's end we will focus on building on the UK City of Culture legacy and developing new products and markets, with an agreed and sustainable delivery model

  The plan will be reviewed through these phases and revised where necessary.

- **A long-term process** – we recognise that developing Southampton as a visitor destination and brand is a long-term process that will require on-going investment and commitment. If this was easy, we would be further along that journey - but we have a good foundation upon which to build.

- **Our strategic proposition** - in the longer term, our core focus will be about building on enhancing our cultural offer and strategy, City of Culture legacy and using it as a differentiator for the city within the wider Hampshire/Solent offer. Drawing on the notion of Southampton's Stories - the past and the contemporary, the diverse and inclusive we recognise Southampton's product needs further development and this will take time.

  In the short term (the Recovery and Foundations phase), our activity will focus on using and enhancing a wider set of themes that the city already has strengths in – our theatre and performance culture, nightlife, retail, the surrounding area and its heritage and attractions, which will need ongoing investment and improvements plans.

- **Theme mix** - the focus will be on developing four motivational themes and markets over time. These are summarised in the following table below:

Experience theme	Description
Discovery and Enrichment	Developing our cultural (and heritage) and parks offers over time. Our market focus will initially be on day visits but as the product develops the market focus will broaden.
Conferences	Focusing on multi-day conferences that are attracting national (and international) delegates.
Cruise	A two-fold approach. Firstly, to increase the length of stay of embarking/disembarking passengers and, secondly, encouraging more transit passengers to visit for the day (through the Discovery theme).
City breaks	Using our theatre and performance, retail and nightlife offers to attract regional overnight trips – primarily couples or groups of friends.

- **Green and sustainable regeneration** – the greening of our tourism sector, in line with our wider city commitments is vital. Elements of this will include prioritising value over volume (through encouraging a greater length of stay and spend) and encouraging efficient use of energy among businesses and visitors, understanding tourism's impact on the environment, and encouraging visitors to think and learn about this as part of the customer journey.

5. Objective 1: Developing a Distinctive Destination

The following sections outline our proposed approach within each objective. For each objective we outline the rationale for why this is important and the longer-term aspirations and needs. We also outline some of the action areas that will be taken forward in phase 1 of the plan (Recovery and Foundations). A detailed Action Plan has been developed and will be agreed and prioritised by the Destination Partnership as part of the annual business planning cycle.

5.1 Rationale and Approach

As a visitor destination we have been performing relatively well – our hotel occupancies and rates are good. However, this is largely driven by less discretionary markets (cruise, corporate travellers, small meetings) and, at present, we lack a distinctive offer that will attract discretionary visitors – i.e. people choosing to visit Southampton as a destination. We have some significant and potentially exciting assets and a priority for the next 10 years is to increase the appeal of the city by developing and strengthening our product.

Culture and Events
Culture will be a core element of our offer. It differentiates us from our surrounding destinations (like the New Forest, Winchester, Portsmouth) but also complements them when marketed in a wider regional offer.

Bidding, securing and delivering UKCoC is of key importance but the momentum we create before and after that is just as important. While UKCoC is about more than the visitor economy, developing our bid should help to catalyse tourism and the visitor offer. Ideally the cultural and creative sector and UKCoC needs to create visitor facing product – e.g. events, exhibitions but also 'on street culture' like murals, public art and street events (using our heritage assets in creative ways).

In the future, we need to develop more high-profile events that have a wider appeal than our current portfolio. Some of these could spin out of UKCoC and should link to some of our city themes (examples could include wine, Ocean/maritime, Titanic etc).   Our parks provide a potential asset to host events, although there are considerations in terms of the environmental and neighbourhood challenges this can create. We also consider a major visitor attraction (ideally within the revitalised Mayflower Quarter) would help to raise profile and add depth to our offer but recognise that the feasibility of this would need careful thought.

Our attractions have done well in digitally engaging with audiences during the pandemic.   To develop tourism, we need to make more of facilities like SeaCity Museum, City Art Gallery, John Hansard Gallery and Solent Showcase in the Cultural Quarter through longer opening hours, temporary exhibitions, smarter (and wider) marketing and place animation in this area. Our theatre and live music are real strengths but need stronger packaging and visitor-facing promotion, and these are augmented by the newly re-opened God’s House Tower as a new heritage and arts centre in 2019.

If deemed appropriate and viable, in the context of the Mayflower Quarter proposals, a purpose-built multi-purpose venue could provide an opportunity to bring in major events/concerts (our capacity is currently limited) and support the development of our cultural theme.

Heritage

We have significant potential in our heritage assets (our Walls, vaults and other buildings) and strong themes (our Medieval and Maritime Heritage, Titanic, Mayflower, wartime Southampton, transmigration, gateway to the world) that are under appreciated and utilised. The dispersed nature of some of our assets and their limited size makes them difficult for visitors to experience and appreciate. Past interpretation schemes have tried to address this but these have not been well maintained or updated to reflect the developing digital opportunities. There are also opportunities to re-interpret and tell the stories of our diverse communities associated with Southampton’s history and heritage, and to reach wider and new audiences.

To make more of our heritage we need to invest in its physical fabric, create itineraries and experiences around strong heritage themes particularly for cruise passengers, group organisers and special interest visitors. We need to investigate the potential for digital interpretation (e.g. augmented or virtual reality), reviewing signing/interpretation boards of our historic monuments and sites to ensure they are up-to-date and integrated across the city. The Bargate offers a potential hub or orientation point for tours and itineraries, interpretation and visitor information combined with other visitor facing elements e.g. events (see above). We could use our heritage assets as a backdrop (e.g. to host street plays, pop-ups) or develop uses to specifically showcase them (e.g. an expanded and developed Heritage Open Days programme).

Our guides and volunteers, and attractions like Solent Sky Museum and SS Shieldhall are an invaluable asset for the city. We need to continue to support and promote them. We also need to consider ways to sustain them – possibly through a city-wide recruitment CPD/training programme, and recognition events linked to other initiatives, including those being developed by UKCoC.

Conferences and Exhibitions

We host some major conferences and exhibitions linked to our academic institutions and specialist position in the Marine and Maritime sector. Smaller residential and day conferences are an important source of business for our hotels and venues. Covid-19 has been disastrous for this sector, but evidence suggests that the post-Covid world will see a resurgence in people seeking to meet in person and carry out business face to face – though there will undoubtedly be an increase in hybrid events that provide virtual attendance opportunities.

However, our conference venue offer has limited capacity – we have a few venues in the city centre and beyond (like Ageas Bowl) that are capable of hosting 500-600 people but some of these (like Southampton Football Club) have limited availability. Larger events in the city typically require bespoke arrangements which may be a barrier for some organisers. Additional venues and increased delegate capacity (with associated exhibition space) would strengthen our offer and provide an opportunity for the city to bid for larger conferences. New hotel developments might increase the number of venues but will not diversify the offer. A purpose-built centre (either dedicated or a good multi-purpose venue – see above) would enhance the offer but there would be a question over feasibility (given competition from Bournemouth and Brighton, and post-Covid uncertainties). Alternatives could exist through further development of the National Oceanography Centre or specific purpose-built facilities associated with existing operations of the Universities or Football Club.

The Southampton International Boat Show in September is a critical event for us – in terms of profile and the business it brings. It attracts 100,000 visitors each year – both day and staying. The organisers, British Marine who are based in the city, have exciting plans to both broaden and deepen its appeal. These plans need to be developed in conjunction with the development and delivery of the Mayflower Quarter proposals.

Cruise

The cruise excursions (day trip) market is not well developed in Southampton and tends to feature destinations further afield, such as Stonehenge, Winchester and London. The product opportunities outlined above, in association with other initiatives (see below) will positively impact on influencing this market to spend more time in the city itself. There may be opportunities to develop relationships with the cruise operators to create a Southampton shore-based offer.

5.2 Action Areas

The following table summarises key areas for action in the recovery period and into the development and stability period:

Action Area	Description
UK City of Culture	Developing the narrative and themes for City of Culture, working up the bid and programme ideas. From a tourism perspective it is key that the programme is as visitor facing in its appeal as possible but also that the tourism sector is in a position to support the delivery of City of Culture (through e.g. commercial approach, product knowledge training, marketing support).
Events	Review existing programme to identify gaps and opportunities and develop a festivals and events strategy, alongside the development of a park's strategy. Work proactively with local and external event organisers to develop new and enhance existing events, particularly focussed on the city's green and outside spaces.

Current City Attractions/ Museums	Improve the performance and attractiveness of our current attractions through longer opening hours, temporary exhibitions, smarter marketing and joint promotion.
Theatre and Cultural Performance	Packaging and promotion of theatre and cultural/music performances with accommodation for potential visitor audiences.
Guiding/ Volunteers	Development of a programme of support and training for existing and new guides and volunteers.
Conferences	Investigate the feasibility of constructing a multi-purpose building capable of hosting larger events/conferences.
The Bargate	Assess the options for development of The Bargate as a visitor hub for the Old Town.
Heritage Itineraries	Re-visit/ develop 3-4 itineraries/ heritage experiences that can be packaged as a guided or self-guided experience. Stories could include Medieval Southampton, Mayflower, Titanic, Migration.
Signage and Interpretation	Review signage and interpretation for our heritage monuments and investigate the feasibility and potential for digital interpretation.
Southampton International Boat Show	Continue to develop the Boat Show and increase its footprint and content to broaden its appeal and links with local hospitality businesses and residents.

6. Objective 2: Transforming Awareness and Perceptions

6.1 Rationale and Approach

We suffer from a poorly-defined image and brand – we have no strong associations for consumers. While this partly reflects our product offer, it also reflects a lack of investment in city-wide marketing over the last decade.

Priorities are to develop our profile as a destination through:

- Focusing on building content and our brand in the long term around themes of Discovery and Enrichment – emphasising our cultural (performance, visual arts and heritage) offer. The developing City of Culture bid will be key to this narrative and stimulating wider communication
- Develop stronger 'Southampton-plc' marketing collateral (aligned to a city-wide approach) – web, social media, print, images etc. for partnership, business and third-party use
- Proactive work with press and third parties (e.g. online travel agents, review sites) on campaign development and content distribution
- Develop relationships with cruise ship ground handlers, group organisers and coach operators to provide ideas for itineraries, familiarisation visits and contacts with local businesses

In the shorter term (the Recovery period) the priorities in theme development will be more pragmatic focusing on retail, the evening economy/theatres, and attractions – primarily targeting our local and regional audiences – through a proactive campaign. VisitSouthampton is an appropriate vehicle for this. As the UKCC bid (and associated content) starts to gain momentum, the emphasis in our marketing should start to evolve.

Business tourism is a vital sector for us. While Destination Southampton does an excellent job in bidding for and organising conferences, they have limited resources for proactive marketing. Much of Southampton's conference business is small meetings from the immediate region and in the short-term online conferencing may impact. A long-term priority should be to increase the amount of marketing undertaken (through e.g. additional event attendance and research into potential events) and the development of a Conference Ambassador programme amongst the city's business leaders and academics to raise the profile of Southampton in specific strong and relevant sectors.

6.2 Action Areas

The following table summarises key areas for action in the Recovery and into the Development and Stability phases:

Action Area	Description
Southampton collateral	On-going development of our marketing collateral through e.g. developing our website (adding more content, lists and making it more dynamic), our social media output, and developing an image and content library for partner use.
Itineraries	Developing existing ideas for half day, whole day and 2-3 day itineraries to feature the heritage, culture, retail and hospitality sector of the city, targeting the domestic day trip and short break market.
Press	Create a bank of digital content for distribution for consumer and travel press and establish relationships with travel media (possibly through appointment of a specialist travel PR company).
Third party content	Research and review existing content about Southampton on third party websites, online travel agents, review sites, bloggers/vloggers, guidebooks and provide updates and accurate content and images as needed.
Third party relationships	Identify organisations likely to be featuring the city and provide a reliable point of contact for promotions. These might include VisitBritain, VisitEngland, TSE, HCC/VisitHampshire, Cruise lines, Coach Operators, incoming Tour Operators, Shore Excursion operators, airlines, airports etc.
Tactical City campaign	Look to develop a regional marketing campaign selling Southampton's retail, the evening economy/theatres, and attractions building on VisitSouthampton and SO What?
Cruise Marketing – (Pre & Post and Official Shore Excursion)	Develop packages with local attractions and hotels; dedicated sections of VisitSouthampton for pre and post stays and transit passengers; agree and collectively resource a specific marketing programme to cruise lines and shore excursion operators. (See also Appendix 2)
Ambassador Programme	Develop a programme to engage with the city's leading academics and business leaders to target national and international conferences relating to their specialist sectors.
Business Tourism Marketing	Marketing to organisers through increased familiarisation visits, potential attendance at key shows, and research into potential events with a good fit to Southampton.

7. Objective 3: Creating a Visitor-Focused City

7.1 Rationale and Approach

Objective 1 focuses on product development that will make us a more compelling destination to consider visiting. However, our wider city offer is of equal importance – the hotels, bars, restaurants, retail all make a huge contribution to a decision to visit and to the satisfaction of visitors during their trip. Sense of place, the urban realm, and our welcome are also key for visitors.

We have a varied accommodation stock in the city centre and surrounding area. In the medium term, as markets recover and grow, additional capacity and variety may be required, and this will need to be determined by further research. For visitors, Southampton's current retail is a great strength and the bar/restaurant offer is reasonable although the city would benefit from greater variety, distinctiveness and quality (particularly in terms of restaurants). We need to continue to work proactively with developers, chains and potential businesses to bring forward viable schemes that will increase our capacity and broaden our offer.

Our pedestrian signposting scheme is good in some places and is particularly crucial given the distances between different areas of visitor interest. In others, wayfinding appears to leave visitors stranded and confused, whilst having to navigate some challenging roads and uneven walkways. The city's arrival/landing points (especially the station and the port) and our road signing need attention. The volunteer guides are good at providing a good in-person welcome at the cruise terminals, but this takes place in a busy and noisy space. It is a volunteer activity that can be withdrawn or reduced at any time. The railway station equally fails to enthral and excite visitors or residents keen to feel pride in their city.

The lack of an accessible waterfront is seen as a weakness for the city. Certain areas of the city, particularly the Cultural Quarter, lack animation especially at weekends. The Mayflower Quarter proposal and planned infrastructure changes as part of the Transforming Cities Fund represents an exciting opportunity for both residents and for our visitors – helping to create a more legible city, improving the city's gateways and enabling waterfront access at Mayflower Park.

Addressing these city-wide issues will be a long-term priority and will be largely driven by broader city centre development plans (like the Mayflower Quarter); and by the local/regional economy and population (captured via the emerging Local Development Plan) driving investment in retail, bars, restaurants and other facilities. However, in our broader city and economic planning we need to think 'tourism' and understand the wider economic benefits it brings – embedding the needs of our visitors in future developments and making the city more distinctive. This includes considering how visitors move around the city on foot and by public transport. Pan-city bus travel is good at moving residents around, but the travel experience of visitors falls short.

Tourism is not high profile within the city and the overall welcome and information for visitors needs to be improved. A specific tourist information centre is unlikely to be cost effective but there are a range of other initiatives that could be implemented: e.g. a visitor hub at The Bargate (see above) and/or God's House Tower; Visitor Information Points (i.e. information resources in visitor facing locations – a hotel, attraction or retail space); and staff engagement, training and familiarisation (with a view to cross selling the city).

Cruise visits are crucial to our city. We have a lot to offer passengers on transit cruises. The strength and variety of the excursions available to passengers is fundamental to that success, but we want to attract more of those passengers into the city itself. However, the arrival experience in Southampton is poor with busy roads and inappropriate exits from the port, lack of connectivity to the railway station and a lack of quality welcome facilities, foreign language print and coordination among the various parties involved in shoreside welcome. We need to work collectively to improve the experience on arrival, make it easier to access the city's heritage assets and to offer unusual 'behind the scenes' experiences. Most transit passengers are from Europe and we need to make sure we can welcome them in their own languages. For the British passengers who stay in our city before or after their cruise, we want to invite them to stay longer and experience more of what Southampton and surrounding destinations have to offer.

7.2 Action Areas

The following table summarises key areas for action in the recovery period and into the development and stability period:

Action Area	Description
Planning/Place-shaping	Embedding the tourism agenda in wider city planning and policy and licensing, delivering development schemes and ensuring we take account of visitors in future developments and our city maintenance, alongside that of residents.
Investment and Facilitation	Facilitate and encourage new hotel and attraction development – through provision of information and insight (e.g. the Hotel Solutions work) and supporting developers/ prospective businesses.
Visitor Information Points (VIPs)	Creation of a network of Visitor Information Points (VIPs) at the City Council's own attractions and other visitor touch points (like God's House Tower, retail centres), supported by maps and relevant printed material, training and displays.
Staff Training	Development of training materials, highlighting Southampton's stories and key locations - including Welcome to Excellence training – and rolling this out to front of house staff at hotels, taxis, volunteers at cruise terminals and cruise ship staff, shore excursion companies etc to ensure quality and consistency. This could be potentially introduced as part of the UKCoC bid.
'City Welcome'	Develop dedicated 'City Welcome' content in partnership with cruise operators (and agents) for distribution to cruise ship passengers staying in the city, with special VIP offers, suggested itineraries – to encourage longer stays and repeat visits
Animation	Animation of city open spaces – especially the Cultural Quarter (links to objective 1) through e.g. working with the city's arts, creative and cultural sector to showcase our creativity, pop-up bars/ restaurants, 'container quarters' or creative zones
Signage	Improve 'Welcome to Southampton' and 'White on Brown' tourist signs on access roads into the city for those arriving by car and for foot passengers from cruises and ferry ports to create a sense of place and welcome

8. Objective 4: Working in Partnership

8.1 Rationale and Approach

The number of committed organisations we have in Southampton is a strength with various organisations delivering parts of our tourism agenda. However, there is no one organisation owning and leading tourism. Resources within the sector are limited and this hampers our activity. In the short-term, issues like Covid-19 recovery and the BID Renewal ballot create uncertainties about resources and our organisational landscape. There is a widespread and strong commitment to the city and a real desire to improve things. This gives us a great foundation on which to build.

Moving forward we need:

- Leadership in terms of an organisation or group that will drive the Destination Management Plan forward and enhance the sector's profile in the city
- A single voice that represents and advocates for tourism in Southampton
- Greater private sector involvement in decision-making and implementation, and funding destination related activity
- To work in a wider context in terms of:
    - Working with other interests (planning, regeneration, events, City of Culture etc.) across the city to ensure that a holistic approach to the visitor economy is adopted
    - Work beyond the city's boundaries with other destinations to provide and promote customer focused experiences
- Facilitate and enable partnerships to work locally and develop initiatives together
- Improve market and product intelligence

We have examined a number of options for the development of a destination management function and concluded that a 'virtual' Destination Management Organisation (or Destination Management Partnership) is proposed in the short term. At this stage, it is the most viable option in the absence of the opportunities to levy sufficient income to sustain a DMO. This is at a time when other DMOs are struggling financially and may have to resort to alternative models (reflected in the DCMS review of DMO models).

It builds on our strengths (like Destination Southampton and GO! Southampton). However, it is not straight-forward and it will require partners to work together and align resources to make it happen. It can also evolve over time into a more formal organisation (if required) and provide a single partner relationship for the UKCoC bid. The current roles of Destination Southampton and GO! Southampton make it even more appropriate; but the solution is unique so it is not without risks. It will only succeed if all the players commit time and resources to delivering the DMP and a shared vision and purpose. Without this, the DMP cannot progress, unless the city decides to pursue an alternative leadership model and finds a mechanism by which this can be financed.

It is proposed that our Destination Partnership appoints an independent chair who will be the voice and face of tourism in the city, developing external relationships at regional and national levels. The board will involve both public and private sector bodies and consist of existing organisations to minimise duplication and build on momentum. It will oversee the delivery of this DMP, setting annual objectives, agreeing the (annual) work programme and allocating any shared/additional resources to delivery partners or contracted third parties. The partnership will be supported by a new, dedicated resource based in the Council to coordinate activities. We will investigate the appetite for more regular industry-wide events (e.g. an annual conference or an Awards programme).

The new partnership will bring together our existing organisations (e.g. the Southampton Hoteliers Association, Destination Southampton) into a single umbrella grouping. This will enable us to make a stronger case to local strategic decision-makers, key agencies and media, providing evidence of the importance of the sector to city and a voice for tourism at the top table. We will ensure integration into other strategic economic forums and investigate the need for additional business support programmes in the city.

Strengthening our external regional and national relationships will enable us to adopt a more concerted and joined-up approach to seeking external funding to deliver the city's priorities. The partnership will also develop a stronger evidence base through the commissioning of market research and monitoring our progress in delivering this DMP.

8.2 Action Areas

The following table summarises key areas for action in the recovery period:

Action Area	Description
Destination Management Partnership	Agree and establish board with an independent chair and supporting structure, agree and appoint resource (if necessary) to develop progress and sustain momentum. Consider resources required to deliver programme and appoint either lead partners or contracted third parties to deliver specific area and develop advocacy for the sector, dovetailing with wider governance approaches.
Network Development	Investigate appetite for, and feasibility of attracting industry-wide events and business support to Southampton
External Party Liaison	Develop appropriate relationships with nearby destinations, LEP, TSE, VB/VE with a view to pooling and attracting additional resource
External Funding	Building from the action plan seek to secure external funding for appropriate delivery, ensuring city-wide coordination and avoiding duplicate applications.
Research	Develop an on-going programme of research to support marketing, development, and monitoring activity. Examples could include accommodation occupancy, event impacts, visitor surveys, economic data, cruise insights, customer journey.
Programme Management	Agree priorities and KPIs for DMP delivery; consider, agree, and pool resources among partners