

Foreword

As partners of the Tamar Estuaries Consultative Forum (TECF) we acknowledge the recommendations outlined in the Plymouth Sound and Estuaries Water Transportation Study in principal, and are prepared to broadly support these recommendations through the work of each of our individual organisations.

It is recognised that there are a number of water transportation related projects currently being investigated. Feasibility studies and other information searches being undertaken as part of these projects will contribute to further clarify, the viability and sustainability of a water transportation network, and the options for integrating water transportation with other transportation systems. These studies will also contribute to providing a more focused assessment of the shore-based infrastructure and service requirements and an overview of the potential employment opportunities that would be generated.

Relying on the Water Transportation Study as a basis for information, additional, more detailed information, especially that generated from primary data collection and analysis, will be integrated, in order to support and inform decision makers in the wider strategic debate on the future integrated transport proposals for Plymouth and the Tamar Estuaries. It is noted that all initiatives contributing to the development of water transportation in the estuary and sound, place primary importance on reducing environmental risk.

**TAMAR ESTUARIES CONSULTATIVE FORUM PLYMOUTH SOUND
AND ESTUARIES WATER TRANSPORTATION STUDY**

Report compiled by: N. Rugg Record of
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EXECUTIVE SUMMARY

The waterfront is Plymouth's 'Unique Selling Point'. The City has many problems – deprivation, unemployment, areas of dereliction – but it is located in one of the most spectacular settings in the country. There are many plans to regenerate the City and in particular the waterfront areas, but in order to make these plans happen, Plymouth's profile needs to be raised and investors, occupiers, residents need to be convinced that Plymouth can be transformed. An attractive, good quality water-transport system would provide a significant contribution to that transformation, by changing the emphasis of the City towards the waterfront and making much greater use of areas of the City with a high international recognition factor such as the Hoe. It would also provide much needed sustainable access solutions to major regeneration sites in the City.

It is difficult to provide accurate predictions about the future levels of demand, when so much of the waterfront area is still the subject of studies to determine their future. What is clear is that Plymouth needs to make much more of its waterfront and promote the waterfront and the qualities of the City in order to assist in the implementation of its ambitious regeneration proposals.

In order to predict the potential demand for new and enhanced services the study has explored two key drivers. Firstly, the demand for water transport by residents of waterfront communities in the study area, including areas subject to regeneration. Secondly, tourism and recreation trends, initiatives and proposals that could significantly increase the demand for water transport to waterfront attractions and areas for recreation within the study area.

The review of the potential demand from residential communities has led to the conclusion that a service linking residential areas on the Plym with the Barbican could be viable as could services from Millbay to locations in the Western Sound and Hamoaze and from Mutton Cove and North Corner to Cremyll. The timing of these services will depend upon the progress made on various development projects.

Plymouth already serves as a major day visit destination for visitors staying in holiday accommodation outside the City. Forecasts indicate that the main leisure tourism types accommodated by the City (short breaks and trips to friends and relatives) are all set to increase. In addition, the resident market, particularly within Plymouth, offers significant opportunities in the leisure and recreation sector. Against this positive background, Plymouth is a changing City with substantial redevelopment set to give the City's waterfront a higher profile across a wide spectrum of activity. New capital projects such as the Centre for Marine Excellence, the Naval Base Visitor Centre and Royal William Yard will all generate new visitor activity and change the geographical pattern of visitor use of the City.

The study has concluded that future demand will be sufficient for new and enhanced services in the Upper Tamar Valley, from the Barbican to the Upper Tamar, from the Barbican to Mount Edgecumbe and from the Barbican to the Hoe, Millbay, Royal William Yard, the Devonport Flagship Project and the proposed Naval Base Visitors Centre.

In addition to the development of new services, the promotion of water transport in Plymouth Sound and Estuaries as an attraction in its own right is seen as an issue of overriding importance. One of the study area's greatest assets is its water frontage and it is strongly believed that many visitors to the area will expect to have the opportunity to explore the area by boat. If greater numbers of visitors can be attracted onto the water, then the viability of a range of services will be enhanced. This will mean investment across the board in facilities, vessels, support infrastructure and marketing activity.

The introduction of Park and Sail at a location outside the city centre would allow visitors to travel to the city centre by boat and water transport tours to start at an accessible location with coach drop off and parking facilities. Easier access to water transport services could enhance its attractiveness to visitors and thereby increase demand. The benefits for the City would include reduced congestion and a reduction in demand for city centre car parking and coach facilities.

Overall it is apparent that it would be possible to create significant demand for an integrated water transport network in the Sound and Estuaries in the medium to long term when a number of development projects have come to fruition. In the short term there is an urgent need to plan for water transport infrastructure as early as possible as accessibility by water is likely to be a key tool in marketing and promoting the development opportunities on waterfront sites. The study has therefore proposed a 'Long Term Vision' for water transport in the Sound and Estuaries and a staged 'Action Plan' as a means of realising the vision.

The proposed 'Long Term Vision' for water transport includes:

- New state of the art landing facilities in the Barbican with full accessibility for the disabled, capacity for a number of vessels to berth at the same time (including tenders from cruise ships), shore facilities including toilets, service and visitor information, ticketing, and real time passenger information, public transport connections, a high quality, attractive and welcoming built environment and appropriate retail and food/beverage outlets.
- A range of services from the Barbican to:
 - The Western Sound – a frequent circular water bus service, provided by more than one vessel, to the Hoe, Millbay, Cremyll, Royal William Yard, Devonport and Saltash.
 - The Plym – a water taxi service calling at Mount Batten and new landing facilities at Turnchapel, Oreston, Hooe and Coxside.
 - The Upper Tamar Valley as far as Calstock with intermediate stopping off points.
 - A Park and Sail location in the Cattewater.
- Various harbour cruise, fishing and activity services. • An enhanced service from Stonehouse to Cremyll with new facilities with full disabled access at both ends, possibly with a link to new landing facilities at Millbay. • A new service linking North Corner, Mutton Cove and Cremyll. Landing facilities at Mutton Cove and North Corner would be improved but may not allow full disabled access.
- Ferry services operating in the Upper Tamar possibly as an extension of the Calstock Ferry, operating on a circular route linking points of demand. The service would be provided by simple open ferry boats. Landing stages would only be designed for disabled passengers if the larger vessels operating on the Barbican to Calstock route could berth.

- The use of modern vessels, with passenger capacities and facilities to suit the particular service.
- A co-ordinated marketing strategy aimed at promoting individual services and the concept of water transport as an attraction in its own right.

The Action Plan identified specific short term actions under various categories including:

- Capital Projects: New facilities at the Barbican, Cremyll, Stonehouse, Mutton Cove and the Upper Tamar.
- Improvements to Services and Transport Linkages: Seasonal services in the Hamoaze and Western Sound and improved transport linkages in the Upper Tamar
- Management: The setting up of a Steering Group and Federation of Water Transport Operators.
- Planning: Securing provision for landing facilities as part of new developments and requiring private developers of waterside to include landings facilities within their developments.
- Design: Design standards for landing facilities, shore facilities and vessels.
- Funding: The identification of funding opportunities for project in the Action Plan.
- Marketing: The development of an overall strategy as well as suggested specific marketing activities.
- Training: Training for Water Transport Operators in maritime operations and safety, customer care and business management.

Medium to long term actions include the inauguration of a more extensive service on the Plym, the promotion of a 'hail and ride service' as a precursor to a water bus service from the Barbican to the Western Sound and Hamoaze and the establishment of a circular route in the Hamoaze. The actions will include the development of new landing facilities at a number of locations.

Responsibilities for the various actions have been identified as far as practicable. The report has included details of the costs of new facilities recently constructed in the study area. These provide an indication of the likely costs for future new facilities. More accurate estimates should be prepared as part of the design process.

The short-term opportunities identified by the study are likely to increase the utilisation of existing craft and bring forward plans to invest in new vessels. It is likely that the increased utilisation will add to employment and if the marketing initiatives discussed above are able to improve the seasonal spread of visitors, then a greater proportion of the employment will be year-round. It is envisaged that with adequate marketing and other support short to medium term employment targets of five additional full time jobs and eleven seasonal jobs could be achieved. Longer term employment targets could be substantially greater, although very difficult to assess at this stage.

In addition to the increased employment in the water transport operators themselves, there are likely substantial wider benefits. Water transport will help to secure the viability of tourist

attractions and other visitor-facing businesses through raising the profile of the waterfront and

tangibly delivering customers. Even at an early stage, a firm stated public commitment to water transport can be used in attraction and other visitor facing facility business planning.

The presentation of water transport has the potential to be a key factor in the development of Plymouth and the surrounding districts as visitor destinations. If it is able to play such a role, then the employment supported will be very substantial.

The wider use of water transport is unlikely to lead to significant reductions in traffic congestion in peak hours. However, the introduction of Park and Sail, if feasible, could reduce the need for visitors to travel into the City Centre to find parking. This would lead to a reduction in seasonal congestion and the demand for parking, particularly in the Barbican area.

1. **1.0 INTRODUCTION**
2. **1.1 Context**

Plymouth Sound and its Estuaries are unique in their blend of natural beauty, range of habitats and species and wealth of historic built environment. They create a barrier to and an opportunity for person movement. Their use as a means of transportation peaked in the late 1800's / early 1900's and has declined ever since.

It has been suggested that current and planned development of waterfront sites combined with increased car usage and congestion may provide the impetus for water transport to once again play a greater role. This study seeks to determine whether conditions are now right for the development a practical integrated water transportation system between population centres and key visitor attractions.

1.2 Client

The Tamar Estuaries Consultative Forum is a non-statutory body overseeing the management of Plymouth Sound and the estuaries which flow into it. Membership of the Forum comprises:

- . • Associated British Ports
- . • Caradon District Council
- . • Cattewater Harbour Commissioners
- . • Cornwall County Council
- . • Countryside Commission
- . • Department for Environment, Food and Rural Affairs
- . • Devon County Council
- . • Devon Sea Fisheries Committee
- . • English Nature
- . • Environment Agency
- . • Plymouth City Council
- . • Queen's Harbour Master
- . • South Hams District Council
- . • South West Water
- . • Sutton Harbour Company
- . • West Devon Borough Council

The Tamar Estuaries Consultative Forum appointed Scott Wilson, consulting engineers and transportation planners, in association with Atlantic Consultants, development economists and town planners, to carry out this Water Transportation Study for the area covered by Plymouth Sound and its Estuaries.

1.3 Study Brief

The brief for the study was to investigate the extent to which an integrated transportation service in the Tamar Estuaries was likely to be practical and viable. The scope included consideration of:

The attractiveness of a water transport service to:

- . • Commuters.
- . • Shoppers.
- . • Local residents for recreation.
- . • Tourists – day visitors.
- . • Tourists on longer stays.

The direct and indirect benefits to:

- . • Businesses.
- . • Retailing.
- . • Tourism.
- . • Other economic interests in Plymouth and the wider Tamar Valley and Estuaries.

The potential to add to / support:

- . • Regional recreation initiatives – both existing and proposed (e.g. South West Coast Path; Tamar Valley Discovery Trail; National & local cycle routes etc.).
- . • The local public transportation network.

1.4 Methodology and Report Format

The study was carried out through a system of document review, wide ranging consultation and analysis. In particular the study addressed itself to a detailed examination of the following:

- . • Water Transport within National and Local Planning and Transport Policy.
- . • Review of existing ferry and leisure cruise services within the Study Area.
- . • Review of ferry services external to the Study Area.
- . • Review of existing landing stage provision.
- . • Vessel design.
- . • Investigation into feasibility of new / enhanced services.
- . • Joint ticketing.
- . • Existing and forthcoming visitor attractions.
- . • Regeneration of key waterfront sites.

- Potential for tourist and local visitor exploration of Tamar Valley and the surrounding estuaries / areas.
- Marketing and Promotion initiatives and potential for improvement / increased collaboration.
- Direct and indirect benefits to businesses; retailers; leisure providers; tourists – day visitors and staying visitors.
- Funding, partnerships and outputs.

The findings of the research into the background information and current water transport arrangements are presented in various appendices. Summaries of the relevant key issues are included in the main report in Sections 2 and 3.

The study team has consulted widely with stakeholders, statutory authorities and organisations with an interest in water transport. The approach to consultation and the principal findings are summarised in Section 4. A full list of consultees is included in Appendix G.

In order to determine the potential demand for new and enhanced services the study has explored two key drivers. Firstly, the demand for water transport by residents of waterfront communities in the study area. The study has included consideration of the implications of the various development and regeneration proposals that could change the nature of key waterfront areas and bring significant numbers of additional residents to areas accessible to water transport (Section 5). Secondly, tourism and recreation trends, initiatives and proposals that could significantly increase the demand for water transport to sites within the study area (Section 6). The findings of the appraisal of the potential for new or enhanced services from the landing points within the study area are also summarised in the table in Appendix E.

The viability of the few remaining sites that could be used as a base for a Park and Sail operation are considered in Section 7.

The physical improvements to landing facilities, shore facilities and vessels required to support potentially viable services are identified in Sections 8. Marketing initiatives and funding opportunities are explored in Section 9 and 10 respectively.

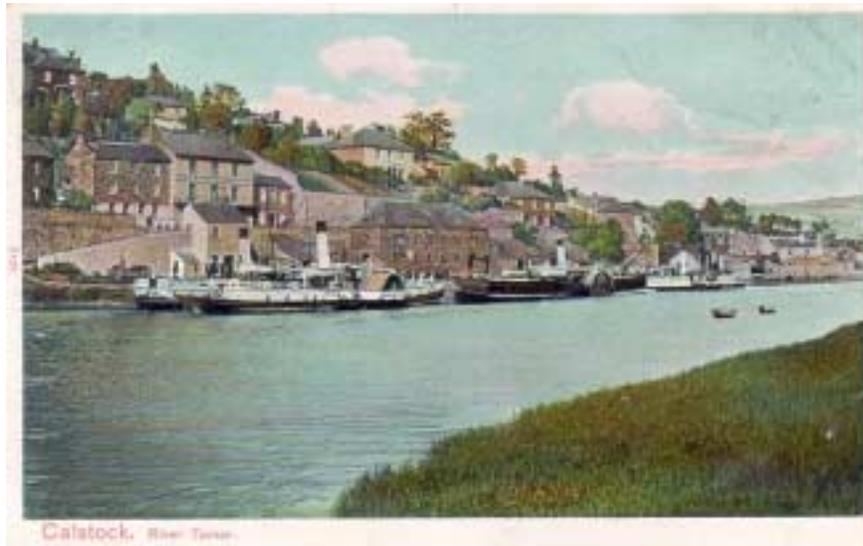
Section 10 draws together the principal findings of the study and recommends an Action Plan for the future development of water transport within the study area.

1. **2.0 BACKGROUND**
2. **2.1 Historical Context**

Plymouth Sound and the Tamar and Plym Estuaries have been a focus of maritime activities for many centuries. Pre-historic settlements lie under water and the historic waterfront of Plymouth may have developed as early as the Roman period, seeking to exploit the natural harbour. The completion of the Breakwater in 1848 provided greater shelter. The Hamoaze has been the home of the Royal Naval Dockyard since 1691. There is a wealth of maritime historic resource to interest the visitor.

The waters of the estuaries and the surrounding land are rich in wildlife and geological features. Much of the area is covered by international, national, regional and local statutory and non-statutory designations. The estuaries and their environs support internationally important populations of birds over winter and during migration. Within the waters are a high diversity of marine habitats with an extremely rich flora and fauna.

While the rivers have formed barriers to travel they have also provided the means to travel. Ferry routes are known to have existed by the 13th century and many are now long forgotten. Their use declined with the construction of bridges and chain ferries, enabling the car and bus to compete in terms of comfort, convenience and time.



Calstock around the end of the 19th Century

The rivers also provided the means to transport goods between the sea and hinterland and produce from the Tamar Valley's market gardens to Devonport Market. By the turn of the 20th century the area boasted the largest collection of estuarial paddle steamers on the south coast of England, providing year round river packet, market steamer, ferry and seasonal excursion

services. In the 1850's up to 1000 trippers visited Calstock on summer Sunday afternoons and by the 1890's this number was almost certainly exceeded. The provision of roads and railways has impacted on the commercial and tourist trade.

The pleasure trip service never stopped but has reduced in capacity. In the mid 1980's there were approximately 15 pleasure craft operating from the Hoe/Barbican. By 2002 this had reduced to 9.

At the turn of the 20th century there were regular ferry services linking:

- . • Cremyll to Admirals Hard
- . • Millbrook to Pottery Quay, North Corner and Mutton Cove (demised 1970's)
- . • Hooe, Oreston, Turnchapel, Cattedown, Mount Batten, Sutton Pool (demised 1960's)
- . • Torpoint to Pottery Quay and North Corner (demised 1930's)
- . • Saltash to Bull Point, Pottery Quay and North Corner (with connections to Upper Tamar ferries) (demised 1920's)

Until recently only one permanent ferry service remained operational, between Cremyll and Stonehouse, and one summer service, between Cawsand and the Barbican. The construction of a pontoon at Mount Batten stimulated the provision of an all year service to the Barbican and Objective 5B funding, with encouragement from the Tamar Valley Service, has initiated a seasonal service at Calstock.

Whilst 'progress' led to the decline in ferry, commercial and pleasure services, further 'progress' has led to congestion on the roads. However, there is now a greater appreciation of the quality of life, increased leisure time and an understanding of and interest in the natural and historical environment. In addition a large amount of regeneration has and is planned to take place around Plymouth's waterfront and transport policies are seeking to encourage the provision and use of more sustainable modes of travel. These drivers could stimulate a future revival of water transport.

2.2 Previous Studies

A number of studies, of varying depth, into Water Transport Services are known to have been carried out over the years. Plymouth City Council undertook the most recent study in the early 1990's with funding provided by the Council, the PSECETS Steering Group and the West Country Tourist Board. The report looked in some detail at demand, cost and income.

The study carried out an in-depth demand / cost analysis and made use of stated intention and stated preference surveys. It also used results from a survey of Visitor Attitudes to water transportation carried out on the Barbican. Of note is that the four options selected for testing following a cost analysis were all on the Plym:

- . • Oreston – Barbican (Park & Sail)
- . • Oreston – Barbican (Walk & Sail)
- . • Oreston - Turnchapel / Mount Batten (Walk & Sail)
- . • Mount Batten (Park & Sail)

The initial analysis was based on the choice between boat and bus for a particular route and took no account of the relationship to the highway network or land availability for infrastructure (for car parking etc). The requirement of the Queen's Harbour Master to keep the existing maximum speed limits to maintain safety suggested that the journey times from Saltash and Torpoint would be unattractive.

The report concluded that:

- . • Water transport could play a significant role in boosting tourism & economic development and could in itself be a visitor attraction.
- . • It could contribute, although probably not substantially, to the control of peak-hour traffic congestion on the approaches to the city centre.
- . • The main obstacle to the establishment of water transport was cost; it was difficult to identify a financially viable service.
- . • The greatest potential was related to the visitor and tourism market and this would be enhanced with the further developments of the key waterfront sites.
- . • The development of sites such as Drakes Island and Royal William Yard would be assisted by a water transport system.
- . • The contribution that Park & Sail could play in generating demand for water transport should not be underestimated and to delay its development risks losing sites upon which to provide parking.

Earlier studies included;

- . • The Millennium Water Transport bid document (the bid was unsuccessful).
- . • Halcrow Fox study of a Mount Batten link (the link is now in place).

The Tamar Estuaries Consultative Forum carried out an audit of public access to the Tamar Estuaries in 1998.

2.3 Planning Context

A detailed review of relevant planning and transport guidance and policy has been undertaken as part of this study. The findings of this review are set out in Appendix A.

The key findings may be summarised as follows:

National Planning and Transport Policies have undergone a significant change by recognising that enabling unrestrained use of private transport is unsustainable. The latest policies attempt to reduce car travel, promote public transport, walking and cycling and provide sustainable transport choices.

Both National and Local Planning and Transport Policies strongly support the development of a water transportation system:

- . • Tourism and leisure is recognised as an important part of Plymouth's economy
- . • Improving access for visitors is viewed as important and it is recognised that the Plymouth Waterfront suffers from poor access.
- . • The urban area includes MoD and mineral working land suitable for housing or employment development. Much of the available land is within reach of the waterfront.
- . • The waterfront is recognised as having a high profile link to the City's history and viewed as key to future regeneration.
- . • Water transport reduces reliance on the car, and there is a need for an integrated approach to transport issues.
- . • Redevelopment of regeneration sites will increase pressure on the current transportation system.
- . • The Tamar Valley is in a good position to further develop an integrated non-car leisure transport system.

This support however is mainly by way of encouragement and reservation for the future rather than financial input.

The substantial regeneration opportunities in Plymouth will be enhanced through the development of a water transportation system. However the issues relating to access to the waterfront and integration with other elements of the City and regional transport systems will have to be resolved if water transport is to be more widely used.

1. **3.0 EXISTING WATER TRANSPORT SERVICES AND FACILITIES**
2. **3.1 Introduction**

A detailed appraisal of existing local water transport services is included in Appendix B. The appraisal encompasses landing points, vessels used, timetable and fare information where available, and details of linkages with other transport services.

Beyond the area of the Study there are 13 foot-passenger ferries operating in the rivers and estuaries of Cornwall and 11 in Devon. These were subject to an in depth investigation to determine:

- . • Whether similarities existed that would indicate viability of services in the Study Area.
- . • The effectiveness of marketing, in terms of its attractiveness and the ease of obtaining information.

An investigation was also undertaken into the ferry services at conurbations of similar size at Southampton and Portsmouth. The detailed findings of these investigations are included in Appendix F.

3.2 Existing Services - Local Ferries

The Cremyll Ferry

The ferry is operated by Tamar Cruising and Cremyll Ferry. The service provides a link between Admirals Hard in Stonehouse and Cremyll in South East Cornwall.

As a mode of transport for the local population the ferry is used for commuting, education, shopping and limited leisure (since services cease at 6.30 pm in winter and 8.30pm in summer). In the reverse direction (from Plymouth) there is a minimal use for commuting by workers employed at Mashfords Boatyard, RNLI crew of boats undergoing refit there and workers at Mount Edgecumbe Country Park. The vast majority of users from Plymouth are leisure visitors to the Park and the Public House at Cremyll.

On the Cornish side it predominantly serves residents of the parishes of Millbrook and Maker-with-Rame. Millbrook and the twin villages of Kingsand and Cawsand are approximately 2.3 miles from Cremyll.

There are integrated public transport links to the ferry on either side.



Cremyll Slipway

The Mount Batten Water Taxi

The Mount Batten Water Taxi Service runs between the Barbican (Commercial Wharf) and Mount Batten. The service was introduced on completion of the new landing stage at Mount Batten in 1998. At both landing stages are rise and fall pontoons: at Mount Batten designed for full disabled access and offering weather protection; at the Barbican the structure is open to the elements and the ramp is of insufficient length and hence too steep for the disabled at low tide. The water taxi runs on the ½ hr / 1hr from Mount Batten and ¼ hr / ¾ hr from the Barbican. The trip takes approximately 3 minutes.



Mount Batten Water Taxi Pontoon – Commercial Wharf

There is a bus service to the Mount Batten Terminal and free parking. A regular bus services runs from the Barbican to the City Centre and railway station.

Plymouth to Saltash Ferry

From April to October 2003, Plymouth Boat Cruises will run a timetabled service between Phoenix Wharf and Saltash. As the season develops the potential to continue the service into the winter will be assessed. The service will run between 10am and 4.15pm and will therefore not be suitable for commuting.

Torpoint Ferry

The Torpoint Ferry is a vehicular chain ferry linking Torpoint with Devonport. Charging for pedestrians and individual passengers was dropped many years ago and for logistical (if not political) reasons it seems most unlikely to be reinstated, even though it could prove to be a valuable source of income. In normal circumstances the ferries run every 10 minutes throughout the working day reducing to a 30 minute frequency overnight. The service is very popular and plans are in hand to increase capacity. The ferry is integrated with other public transport services.

Tamar Passenger Ferry

This ferry is operated by the Calstock & Motor Launch Company and links the Bere Alston side of the Tamar to Calstock and Cotehele in Cornwall. It has a capacity of 12 passengers and it is completely open to the elements. An almost daily service is run between the middle of May and the end of September. The timetable shows a very limited service in October to December. The service is dependent on the tide, which regulates its start and finish times, and on certain days the low tide through daylight hours prevents any service at all.



Tamar Passenger Ferry

The company has a larger launch which makes regular trips between Calstock and Morwellham Quay / Weir Head. This service is advertised in the Morwellham Quay brochure. The company also runs occasional trips between Calstock and Saltash with a historian on board detailing the history of the area and the use of the Tamar as a means of conveying local produce to Devonport Market.

3.3 Existing Services – Recreational / Harbour Cruises

The recreational cruise business is very seasonal and weather dependent and subject to passenger demand. The cruise business is carried out by several companies from different locations; Mayflower Steps and Phoenix Wharf on the Barbican, and Pebbleside Pier on the Hoe. None of these locations provides satisfactory disabled access.

Tamar Cruising

Tamar Cruising operate from Mayflower Steps on the Barbican. The trips on offer are:

- . • 1 hour cruises up the Tamar to see the Dockyard and Warships
- . • 2 hour cruise to the River Yealm
- . • 4 hour cruise to Calstock

Plymouth Boat Cruises

Plymouth Boat Cruises (PBC) offer the same selection of cruises but from Phoenix Wharf on the Barbican. PBC also provide a May-September timetable of the 4 hour cruise to Calstock which is arranged to suit tidal conditions. They also offer evening and special event cruises.

Cawsand Ferry

The Cawsand Ferry operates *The Western Maid*, capacity 65 persons, on a summer scheduled service between Cawsand and Mayflower Steps on the Barbican. The service has been running for about 20 years. It is very weather dependent and 2002 was the poorest for at least the last 7 years. In a strong easterly wind it is impossible to land at Cawsand. There are 4 trips daily from the Barbican at 10.30am, 12 noon, 2.30pm and 4pm returning from Cawsand at 11am, 12.30pm, 3pm and 4.30pm.

Devon Belle

The *Devon Belle* operates from Pebbleside Pier which is to the west of Tinside on the Hoe. Access is via many sets of steps and the landing is exposed. Four 1 hour cruises a day are advertised up the Tamar to view the Dockyard and Warships at 11.15am, 12.35pm, 2.00pm and 2.30pm.

Other services

Mount Batten Water Taxis and Silverline Cruises offer pre-booked cruises to suit customer needs. Weber Marine Services offer boat trips to diving groups and pick up from the Mount Batten pontoon. Serco Denholm operate a large fleet of scheduled services for the Naval Sea Training facility and personnel movement associated with HM Naval Base under contact to the MOD.

3.4 Landing Stages – Existing Provision and Condition

The Tamar Estuaries Consultative Forum carried out an audit of most but not all public access points to the Tamar Estuaries in 1998. This looked at 49 access points from Cawsand to Fort Bovisand. At that time the only publicly available rise and fall landing stages existed at:

- . • Calstock – this was at the time unsuitable for the less mobile due to steps and steepness of the ramp.
- . • North Corner – also unsuitable for the less mobile due to steps and steepness of the ramp.

Since that date a further three have been added and the landing stage at Calstock has been renewed:

- . • Saltash. The landing stage was primarily designed to provide a landing stage and mooring for yachts but could also accommodate small ferry boats. The landing stage was not designed to accommodate the larger ferry vessels that operate in Plymouth Waters. The landing stage has a ramp which is suitable for use by the disabled at all states of the tide. The facility was built for Caradon District Council.
- . • The Barbican. This private landing stage was installed by the operator of the Mount Batten Water Taxi and the water taxi to Queens Annes Battery. Although access to vessels is possible at all states of the tide, the access ramp is too steep and narrow for use by the disabled.
- . • Mount Batten. This new landing stage was procured by the Plymouth Development Corporation as part of their package of regeneration works for the Mount Batten Peninsula. The landing stage was designed to be fully accessible to the disabled at all states of the tide. Access is possible for the large ferry boats that operate in the Sound at all states of the tide. The complete installation cost in the region of £600k in 1998.
- . • Calstock. The new landing stage, completed in Spring 2000, was designed to accommodate the small Tamar Passenger Ferry at one level and the larger ferry boats at an upper level. Disabled access is possible to the upper level at times when there is sufficient water for these vessels to berth. The cost effective design (<£100k installed) would be suitable for sheltered estuarial waters elsewhere in the study area.

Private landing stage facilities exist at:

- . • Jupiter Point (MoD).
- . • Mayflower Marina.
- . • Queen Anne's Battery.
- . • Yacht Haven Marina.
- . • Saltash Passage (Plymouth).
- . • Trevol (HMS Raleigh, Torpoint).
- . • South Yard (HM Dockyard for Museum).
- . • Royal William Yard.
- . • Trinity Pier and others, Millbay (ABP).

Slipways, jetties and walls with public access, likely to have full tidal range, exist at:

- . • Spaniards Inn, Cargreen
- . • St Germans Quay
- . • Mutton Cove (outer wall)
- . • Admirals Hard (Stonehouse)
- . • West Hoe (outer harbour wall)
- . • Pebbleside Pier (the Hoe)
- . • Boatman's Jetty (the Hoe)
- . • Phoenix Wharf (the Barbican)
- . • Mayflower Steps (the Barbican)

The landing facilities within the study area are shown on Plan 5.

At the Barbican, the main embarkation point for visitors using water transport in the study area, the facilities present a very poor image.



Phoenix Wharf in the early 1900's

The above view of Phoenix Wharf, from probably the first part of the last Century, when compared with today's view below, shows how little change has taken place either ashore or

afloat. One of the boat operators pointed out that when marketing their cruises they deliberately do not send views of the Wharf to tour companies. This illustrates that there is a real need for an improvement to the image presented in order to regenerate interest in water transport as a tourist activity.



Phoenix Wharf Landing Stage

Commercial Wharf - the area between Mayflower Steps and Phoenix Wharf - is also in need of tidying up and has great potential. It is currently used as a boat storage area with a number of lock-up stores under the roadway. As outlined in the Local Plan, it could become a pedestrian area with shops, cafes and sitting areas and this would enhance and make use of the waterfront setting and bring the whole area with its associated leisure cruise activities into greater focus.



Commercial Wharf Mayflower Steps



A condition survey of landing areas was carried out in 2001. This identified a backlog of £1.25 million of maintenance works of which £300,000 was deemed to be essential for health and safety reasons.

3.5 Car / Coach and Water Transport Interchange Facilities

The principal existing interface between visitors arriving by car or coach and water transport services occurs at the Barbican.

While there are no coach parking facilities at Mayflower Steps there is a small coach drop off facility at Phoenix Wharf. Longer term coach parking takes place at Bretonside Bus Station, approximately ¼ mile away at £5 for up to 4 hours and £7 for over 4 hours. Alternatively, coach parking facilities are on offer at the Citybus Depot at Milehouse, approximately 1.5 miles distant. There is no coach parking/stopping facility adjacent to Pebbleside Pier on the Hoe. The limitations on coach drop off and parking are considered by the main water transport tour operator as a potential constraint on the further development of the market.

The parking philosophy, as indicated on the car park signing, is that long stay visitors should park in the City Centre car parks and then walk, or take the Discoverer Bus service, to the shops, leisure attractions, the Hoe etc. Alternatively all-day visitors can use the Park and Ride services at Coypool and Milehouse and transfer by bus to the City Centre, Barbican and the Hoe.

In the Barbican itself there is a 53-space car park on Lambhay Hill above Mayflower Steps with a charge of 70p per hour, £3 for 4 hours and £8 for over 4 hours. A car park/dinghy park exists at Elphinstone adjacent to Phoenix Wharf with a parking capacity of 43 cars and the same charging regime. There are around 1000 on-street car parking spaces around the Hoe area with a maximum stay of 2 or 3 hours at a cost of 70p per hour. On the west side of Sutton Harbour the Barbican car park rapidly fills in the summer months, particularly with patrons of the Aquarium. It has a capacity of 370 cars at a charge of 70p per hour, £3.50 for 5 hours, £8 for over 6 hours.

There is a car park at Mount Batten which can be used by water transport passengers travelling on the water taxi to the Barbican.

There is a free 56 space car park on Strand Street close to the Stonehouse landing point for the Cremyll Ferry and a small overflow car park nearby. There are no coach parking facilities. There is a pay and display car park at Cremyll approximately 200m from the ferry.

3.6 Appraisal of Services Beyond the Study Area

The experience in the various estuaries and rivers in Devon and Cornwall demonstrates that where there is a demand for cross water movement that cannot be satisfied by road, entrepreneurs can set up and run services without in the main public subsidy. Where information has been available it indicates that most services rely heavily on use by tourists.

The situation of the ferry services in Southampton, Portsmouth and Gosport in Hampshire is not replicated in the Plymouth area. While the core city populations are similar, Plymouth does not have a densely populated hinterland which is separated from it by water without a bridge between the two. The Southampton and Portsmouth Ferries save a considerable road distance and traffic congestion on these routes is severe.

There is wide disparity between the quality and ease of obtaining information about ferry and leisure cruise operations.

The detailed findings of these investigations are presented in Appendix F.

3.7 Summary

The passenger ferry services from Cremyll to Stonehouse and from Mount Batten to the Barbican, provide significant car mileage savings end-to-end. They also co-ordinate to a degree with bus services at either end and joint-ticketing is available on the Cremyll service. Despite this they both rely on leisure trips to maintain a service for local users. The Torpoint Ferry also allows significant savings in car mileage. Plans are in hand to replace the vessels on this route to increase capacity.

Whilst there are many landing facilities within the Study Area, the majority comprise basic slipways, jetties, seawalls and steps. The only landing stages suitable for use by the disabled are the relatively new installations at Mount Batten, Calstock and Saltash. The general state of landing facilities is poor and well below the standard required to attract and cater for greater usage.

The marketing of services is undertaken by local authorities, the Tamar Valley Tourism Association and various operators. The quality of information is variable and is generally not co-ordinated. For example, a number of different companies run leisure trips without any joint operational / marketing structure.

1. **4.0 CONSULTATION**
2. **4.1 Approach**

Consultation was carried out by a variety of methods including telephone conversations, meetings, and questionnaires. Over 60 Individuals and organisations having an interest in water transport in the study area were consulted whether in a regulatory, advisory, operational or user role.

In addition, nineteen Parish and Town Councils in Caradon, South Hams and West Devon were requested to complete a questionnaire. Five Councils responded initially with five more replying following a further request. The responses received from Parish Councils are included in Appendix G.

Of those responding, five Councils held the opinion that their local residents did not currently use water transport services and that their community would not be served were such a facility to be provided. These Councils were Callington, Landrake, Landulph, Pillaton and Buckland Monachorum.

The output from the consultation process has been used throughout this study report and for brevity in most instances the consultees have not been individually mentioned. The main issues arising from the consultation process are summarised below.

4.2 Consultees

The following organisations were consulted during the study:

Associated British Ports	Blue Badge Guides
Calstock Ferry	Caradon District Council
Cattewater Harbour Master	Cawsand Ferry
Countryside Agency	Crownhill Fort
Dartmouth – Dittisham Ferry	Destination South West
Devon and Cornwall Rail Partnership	Devonport New Deal For Communities
Dittisham – Greenway Ferry	East Cornwall Rural Transport Partnership
Ecocats	Enterprise Boats
Fowey – Mevagissey Ferry	Gosport Ferry
Hampshire County Council	Hayling Island Ferry
Helford Ferry	Howard Marine
Hythe Ferry	Island House TIC
London River Services	Maritime Plymouth
Morwellham Quay	Mount Batten Centre
Mount Batten Water Taxi	Mount Edgecumbe House and Country Park
National Marine Aquarium	National Trust
Ocean Aqua Cab	Padstow – Rock Ferry
Plymouth Boat Cruises	Plymouth Chamber of Commerce and Industry

Plymouth City Council Boatmaster
Plymouth C.C. Transport Services
Plymouth Dome
Plymouth Marketing Bureau
Plymouth Naval Base Museum
Professional Boatman's Association
Queens Harbour Master
Serco Denholm
Smeaton's Tower
South Hams District Council
South West Tourism
Steamer Quay, Calstock
SW RDA
Tamar Valley AONB
Thames Clippers
Wessex Trains

Plymouth C.C. Property Services
Plymouth C.C. Structures Section
Plymouth Gin
Plymouth Mayflower
Polruan Ferry Co
Riverside Launches
Deputy QHM
Silverline Cruises
Sound Trips
South West Coast Path
St Mawes – Place Ferry
Sutton Harbour Company
Tamar Cruising and Cremyll Ferry
Tamar Valley Tourism Association
Town and Parish Councils
West Country Rivers Trust

4.3 Findings

The principle of water transportation in the Plymouth area was widely supported by all consultees. Many noted that the increased use of public transport in the area was a high priority (public sector organisations) and other private sector bodies such as the National Trust noted that they were keen to see more visitors use sustainable forms of transport to visit attractions.

The use of existing water transportation services was considered to be fairly good and in places such as Calstock and Mount Batten patronage of the services has been steadily increasing. There was a general view that the use of water transportation will increase further in the future but that at present the critical mass of users is insufficient to run regular year round services.

There are also views about the impact weather conditions could have on the ability of services to run year round. For these reasons, few consultees expressed the view that water transportation services aimed at commuters would be a feasible option at this stage. The need to 'design in' the potential for water transportation in locations currently being redeveloped was however expressed. Royal William Yard and Millbay were both identified as important potential locations for such services.

The potential for further routes offering seasonal/weekend services was however identified. Calls for more services to run up the Tamar River with additional stop-offs prior to Calstock were made, although it was stated that these should be coupled with increased efforts to tie in services with other forms of public transport such as bus services and Tamar rail services. Wessex Trains indicate that they are willing to consider joint ticketing arrangements.

The potential for additional routes accessing Caradon e.g. Jupiter Point and Saltash was also identified during interviews though it was not considered that the demand on these routes was sufficient to require regular clock face services.

In discussing potential water transportation routes, a number of considerations were expressed by consultees relating to the development of a successful service. These are listed as follows:

- . • Need to incorporate the services within an integrated transportation system and to advertise widely e.g. Leaflets outlining the potential for circuitous routes incorporating Tamar water services and local bus networks. Particular problems have been identified with coach parking in the Barbican and Coxside and a lack of waterside car parking across the city.
- . • Realistic attitude to scheduling of services especially in respect to commuter routes. Services should be frequent and flexible allowing passengers to 'hop-on and off' along the route network.
- . • Need to price the service realistically.
- . • The service should access as many of the main attractions in the area as possible.
- . • Weather protection should be provided especially in relation to commuter services.
- . • Real time information on the arrival of the next ferry and consideration of how to hold potential users until it arrives.

A consistent theme from the consultations has been the role of water transport in increasing the attractiveness of Plymouth to visitors. This is difficult to quantify although it can be argued that without such product developments the forecast increases in visitors to 2010 will not be achieved.

1. **5.0 FUTURE DEMAND FROM EXISTING COMMUNITIES AND DEVELOPMENT AREAS**
 2. **5.1 Introduction**

Catchment Area

Within Plymouth and Caradon the resident population and location of employment opportunities in wards adjacent to the waterfront is distributed as follows:

Ward	Population	Employee Jobs
Plymstock Radford	11,000	2,700
St Budeaux	12,600	1,100
St Peter's	12,400	5,700
Keyham	13,700	7,600
Sutton	11,600	22,300
Saltash*	18,625	3,600
Torpoint	9,500	1,400
Millbrook	1,900	200
<i>Totals</i>	91,325	54,600

1998 Population Estimates 2000 Annual Business Inquiry, NOMIS.
 *Comprises St Stephens, Essa, Pill & Burraton wards.

A total of 61,300 people, almost 24% of the total population of Plymouth therefore reside in wards with frontage onto navigable water with a further 30,025 people living in Millbrook, Saltash and Torpoint in Caradon. Similarly, the Plymouth wards with water frontage provide 39,400 jobs, 40% of the total in Plymouth. A further 15,200 jobs are provided in Saltash, Torpoint and Millbrook.

The Plymouth wards and Cornish towns cover large geographical areas and hence many residents and employment sites may be some distance from the waterfront.

Local Plan Allocation

The Plymouth Local Plan identifies capacity to build 4,924 dwellings in the City. This includes the following area provision:

- . • The City Centre - 732 dwellings.
- . • The Barbican and the Hoe areas - 270 dwellings.
- . • The East End - 816 dwellings.
- . • Millbay and Stonehouse - 553 dwellings.
- . • Devonport - 551 dwellings.
- . • Plymstock – 1,020 dwellings (incorporating Plymstock, Hooe Lake & Radford Quarries and the Former Radford Oil Fuel Depot).

On the basis of these housing figures it is likely that in future years Plymouth will accommodate a larger population within the City. The effects of this increased population upon the local transport system will need to be reviewed but in general it does highlight the increased potential that water transportation offers given that theoretically it could access the majority of the sites listed above. These sites provide the location for many of the new employment opportunities (as a result of mixed use planning allocations) in the City. Many of these employment sites will incorporate facilities such as restaurants, cafes and other facilities that will be attractive to residents and visitors alike.

Whilst a number of the sites/areas identified above may be developed in the near future, there are no assurances on the timescales for any of these sites. Even those areas where planning applications are currently being determined, development will take some time. It is therefore difficult to determine when the capacity of these sites in terms of residential and employment provision will be increased to levels where water transport may become a feasible option.

Urban Regeneration

Plymouth is a changing city. In light of the large number of brownfield sites and increasingly run down nature of certain areas of Plymouth, a number of recent regeneration studies have focused on specific areas of the City. These areas have included Millbay, Devonport, East End, Royal William Yard and Barne Barton.

The studies have attempted to assess the issues within the localities and to produce a 'Vision' or framework for the future development of these areas. All are located along the waterfront and will therefore increase the amount of activity in this area. The regeneration proposals will make more use of the City's unique waterfront asset as well as utilising brownfield sites.

Appraisal of Demand

Whereas the previous Water Transportation Study carried out an in-depth demand / cost analysis and made use of stated intention and stated preference surveys, a less statistical but more encompassing approach has been adopted for this study. It has looked in broader detail at the potential demand, the availability of parking facilities and means of linking public transport to the waterfront. It has also considered the competitiveness of the existing local transport systems in terms of time and cost to assess whether patrons are likely to transfer from a single mode trip to a multi mode trip.

An appraisal has been undertaken for each of the main communities and development sites within the study area.

5.2 Local Ferry Services – Western Sound, Hamoaze, Tamar and Lynher

Millbay

The recent Regeneration Study focuses on an area incorporating Millbay Docks and sites to the north of the dock as far as Millbay Road and Union Street. The area comprises significant tracts of derelict, disused and underused land and buildings yet occupies a strategic waterfront location close to the City Centre. The Millbay Study identified a number of key issues that the masterplan must take into account, including the need to improve/provide access along the waterfront, develop waterfront housing and incorporate employment uses in the area. Within Millbay, East Quay is likely to be used for mixed use commercial (retail) and residential. The inner basin will then be infilled further for marine industry, port related, commercial and offices uses.

The Local Plan refers to Millbay as a Strategic Opportunity Site and states that the future character of the area should incorporate waterfront activity, new businesses and high quality housing. At present (June 2002) outline planning applications for the Millbay have been received and are awaiting determination. Whilst detailed descriptions are not provided, the applications cover two sites (total area 8.2ha) and refer to future development including residential, retail, hotel, leisure and a marina.

It is not considered that the site will provide significant demand for commuting potential but is likely to attract people who enjoy the ambience of the waterside, particularly at a leisure and recreational level. The regenerated site could also become an alternative (to the Barbican) embarkation point for leisure water transport trips, in particular to the Western Sound and Tamar, and an arrival point for onward connections to the City Centre. The development of the facility as an embarkation point would require the provision of a significant amount of shore side infrastructure including car and coach parking. A strong possibility would exist for the recreational water transport services to concentrate on Mount Edgecumbe and the Tamar and as a consequence visitor numbers to the Barbican could fall. For these reasons, the location is seen as most suitable for local and city residents and not as an embarkation point for visitors from outside the city.

The potential for ferry links to Millbay from Cremyll and circular routes linking Cremyll, Millbay, Royal William Yard and Mutton Cove merit further investigation once development has progressed at Devonport, Royal William Yard and Millbay itself.

Royal William Yard

Royal William Yard has also been the focus of significant regeneration work. The site, located on the Stonehouse Peninsula directly west of Millbay Docks, is now owned by the South West Regional Development Agency and partners. A development framework for the future regeneration of the Yard into a business, leisure, commercial, conference and residential complex has been prepared and a planning application for elements of the site has been submitted by Urban Splash.



Royal William Yard

Their initial plans are centred on the Brewhouse and Clarence buildings and include the development of 130 one, two and three bedroom apartments. In addition, proposals will include waterfront restaurant, wine bar, arts exhibition centre and extra landscaping. Mills Bakery is a further building within the Yard for which proposals are being managed by the Phoenix Trust. It is believed that these developments will take approximately 3 years before development is complete and the units are occupied.

The Local Plan allocation for this site incorporates a variety of mixed-use allocations and notes that approximately 200 dwellings can be provided. Notably the Plan allocation states that developers should take into account local community needs within proposals, one of which is the desire for water transport facilities. It is understood that Urban Splash have indicated the possibility of purchasing a launch so that they can show visitors around. A landing stage with full disabled access will be a necessary part of future plans for the site in order to address the leisure and recreational opportunities available.

Whilst the development may become a destination for visitors it seems unlikely that the residential element will generate sufficient demand for a commuter service to either Millbay or the Barbican.

Devonport

Devonport (Urban Village/New Deal for Communities) has long been the focus of regeneration initiatives. In October 2000 the City Council adopted the Urban Framework Plan as the basis for regeneration of the Devonport area and for development control purposes over the next 10-15 years. Today, Devonport Regeneration Company is addressing a significant number of issues within the area including housing development and employment site provision. The regeneration will include the renewal of existing residential property and the construction of additional mixed-use development.

South Yard Heritage Area in Devonport is referred to as a 'heritage quarter' within the Local Plan and is allocated for tourism and heritage development including a Naval Base Visitors Centre based around the existing museum. Notably, development proposals are requested to make provision for public access to the historic naval areas including if possible, water taxi facilities. This aspect of the proposals is discussed in greater detail within the Tourism and Recreation section.

There are two existing public landing stages in Devonport at *North Corner* and *Mutton Cove*. The Torpoint Ferry also serves the Devonport Area.

Immediately behind the North Corner landing stage, housing in the Cannon Street / Cornwall Street area has been demolished and a new housing development is proposed. Inland to the east, the Granby area is penetrated by First Western National service no.80/80A which links to Torpoint via the Torpoint Ferry and the City Centre (approx 10-minute journey) at a ½ hourly frequency. The area further inland benefits from a significant number of additional bus services on Park Avenue. It is likely that these services will be extended into the Cannon and Cornwall Street development in due course.

Whilst it would therefore seem unlikely that a water transport service to North Corner would be used by local residents for non-leisure purposes, the location could become a point of embarkation for recreational visits to Cremyll, Millbay and other locations on the Tamar.

The existing landing stage does however have disadvantages which would need to be addressed. The existing gangway is too short and hence too steep. It also has steps and therefore is unsuitable for the disabled. In addition, there appears to be insufficient water alongside the pontoon at low tide.

The Mutton Cove / Mount Wise residential area is served by Plymouth Citybus service no. 34 to the City Centre (approx 14-17 minute journey) at a ½ hourly frequency. A Water Taxi serving Mutton Cove for non-leisure trips is unlikely to compete on time or cost. Doubts have also been expressed about the ability to run a reliable service to Mutton Cove because of its exposure to south-westerly winds, although it was regularly used up to the 1970's by the Millbrook Ferry service. There is a small car park adjacent to the Harbour. As for North Corner, the location could become a point of embarkation for recreational trips.

During consultation, a request was made for Cremyll to be linked to Mutton Cove to enable Mount Wise and Devonport residents to access Mount Edgecumbe Country Park. While this may be specifically targeted towards the immediately local population who could walk to the harbour the service may prove attractive to residents from further afield. The existing car park is unlikely to be sufficient to cater for users of a boat service and the swimming pool and on-street parking may need to be controlled in favour of the local car owners. In conjunction with the bus service in Cornwall the residents could also access the beaches of Whitsand Bay. In the reverse direction the Rame Peninsula residents could access the Mount Wise swimming pool. However given the tradition of free access to Whitsand Bay the likely take up in this direction is not considered to be significant.

A triangular service adding Mutton Cove to the Stonehouse to Cremyll service has been suggested. However, this arrangement would upset the current half hourly frequency and would affect coordination with the bus services.

A leisure service from Mutton Cove to Cremyll running independently of the Cremyll Ferry during the summer months could be feasible. However access restrictions on the Cremyll side would have to be resolved first to avoid problems with congestion.

It is felt that Mutton Cove could not act as a replacement to Admirals Hard since it is not accessed by the bus service, the car park is smaller and less secure than that at Stonehouse and it is further from the City Centre, Princess Yachts International and Royal William Yard. Other disadvantages include insufficient water within the inner harbour at low tides and exposure to westerly and south-westerly winds.

Barne Barton

Barne Barton is an area of Plymouth sited on the Hamoaze, almost directly opposite Saltash. The regeneration study for this area is presently ongoing. A request has been received for a service linking Barne Barton to be investigated. Due to the presence of the HM Naval Base and RNAD Bull Point, the waterfront is currently within the MOD perimeter fence apart from Kinterbury Creek on the northern side of Barne Barton. Due to the local topography, there are difficulties in gaining access down the steeply wooded slope to Kinterbury Creek. Within Kinterbury Creek itself there is likely to be insufficient water at high tide.

The Barne Barton Estate is served by First Western National service No. 7A which runs through the day at 10 minute intervals and takes 25-30 minutes to the City Centre. A waterbus to the Barbican would take a similar length of time, providing it did not stop en-route. Given the walking distance from most of the estate to the waterfront it seems unlikely that a water transport service would attract much patronage from the existing public transport provision. The distance between the landing stage and the residential population would also discourage its use as a point of embarkation for leisure trips.

The Upper Tamar

The population centres on the Upper Tamar are relatively small and geographically spread out. Demand for local ferry services will therefore be low and insufficient to sustain regular services. However, there is significant potential for the use of ferries by residents and visitors for informal recreation and visits to tourism attractions. This aspect is considered in the following section on Tourism and Recreation.

Saltash

The majority of the residential area is some height above the river and the number of potential customers choosing to walk or cycle to use a ferry service is unlikely to be great. There is little scope for a significant amount of parking.

The waterfront is served by First Western National service no. 52 which connects the town to Derriford Hospital and Plympton on an hourly basis. First Western National also runs service no. 1 / 2 to connect Saltash (but not the waterfront) to the City Centre on a 20-minute frequency. Above the waterfront area Saltash station connects to the rail network. There are 3 commuter time services in the morning to Plymouth City Centre and 3 return services in the evening with a journey time of approximately 15 minutes. The recent works on the Tamar Bridge have increased capacity in the eastbound direction and reduced queues and delays particularly for Saltash residents.

There are plans for a bus based park and ride service from Saltash (Carkeel) to Plymouth and this will require financial input from the local Highway Authorities. A bus based Park & Ride service close to the A38 will be more effective than a water based service in converting car trips to public transport trips. No other areas or towns/villages (apart from Plymouth) served by the waterfront offer significant employment/shopping/health/education facilities.

A direct water transport service between Saltash and The Barbican operating within existing speed limits is estimated to take 30 minutes (the Queens Harbour Master has confirmed his preference for maintaining existing limits for safety reasons). In practice however, a local service is likely to call at other locations and as it will necessarily run to a timetable there must be a small amount of leeway built in. This suggests an allowance of 5 minutes per stop. A service calling at say Saltash, Torpoint, North Corner, Mutton Cove, Cremyll, Millbay, The Hoe and The Barbican would therefore take around one hour. The equivalent scheduled bus journey time between Fore Street, Saltash and Plymouth City Centre is 25 minutes and it is estimated that at most times of the day the equivalent car journey time is no longer than 20 minutes. A water transport service from Saltash therefore has a strong time disadvantage before the land based journey time is added at both ends of the trip.

Data from a survey of motorists crossing the Tamar Bridge in December 2000 was inspected and analysed to give an indication of the potential uptake of a water transport service. The results, detailed in Appendix H, suggest that the likely take up of a regular water transport service as a public transport option will not be significant. The long journey time indicates the need to run 3 or 4 boats to provide a half-hourly service and the volume of passengers to sustain this does not appear to be there.

Until the visitor attractions along the Tamar, such as Royal William Yard and the Naval Base Museum, come on stream there is no source of visitor passengers necessary to subsidise the loss making local use. The incorporation of Cremyll into a 'Tamar Ferry' service could provide a 'visitor' input but would clearly affect the viability of the Cremyll Ferry.

A seasonal / weekend leisure service from Saltash to the Barbican or a service linked to special events in the City (Maritime Festival, Christmas Shopping) might be viable. To test this, Plymouth Boat Cruises are inaugurating a timetabled service between Phoenix Wharf and Saltash, from April to October between the hours of 10am and 4.15pm. The journey time will be 45minutes. There is a possibility of a reduced service running beyond October subject to demand.

Saltash Town Council did not reply to the questionnaire.

St Germans

A service from St Germans could serve a large geographical area but the village is difficult to get to by car or a feeder public transport system. The village has a station on the rail line to Cornwall and has 3 services to Plymouth City Centre and 3 from Plymouth at commuting times. The rail journey time is in the region of 25 minutes. By boat the journey would be very picturesque and relaxing but also lengthy as St Germans Quay is 4.3 nautical miles from the Hamoaze (Tamar). The area's designation as a Special Protection Area and as a Site of Special Scientific Interest (SSSI) could constrain the provision of a new landing facility. St Germans Parish Council did not respond to the questionnaire.

Torpoint

Torpoint already has a free ferry service to Plymouth for foot passengers, cyclists and car passengers and a bus service to the City Centre. There are proposals to increase the vehicular capacity of the chain ferries. First Western National service no.11 runs ½ hourly from the Devonport side of the Torpoint Ferry to Derriford Hospital.

A competing passenger ferry between Torpoint and the Plymouth side of the river is therefore unlikely to attract much patronage since the major employment, shopping, education and leisure areas are some way from the waterfront.

Torpoint is not linked to Saltash by public transport and the River Lynher creates a circuitous route by car. However, employment areas in Saltash are remote from the waterside, although onward travel by bus is a possibility, and gradients within Saltash would discourage Torpoint residents from cycling from the Saltash landing stage.

Data from a survey of motorists crossing the Torpoint Ferry in November 2000 was inspected and analysed. The results, detailed in Appendix H, suggest that the potential take up of a water transport service is unlikely to be high although it is acknowledged that some passengers may prefer this mode of travel regardless of the cost/time.

Torpoint Town Council responded to the questionnaire, supporting the concept of a water taxi service linking the town to Saltash, Millbrook, Cremyll and various locations on the Plymouth side.

Millbrook

In days gone by the ferry service between Millbrook and Devonport used to penetrate as close as it could get into the village of Millbrook depending on the state of the tide. Its patrons on the trip towards Devonport therefore had to be aware of the tide to know which jetty to walk to. On the return journey such knowledge was not vital, however their walking journey would again be variable.

It is certain that such a scenario would not be acceptable today, given the alternatives of a more comfortable and reliable journey by car or bus. Therefore, whilst a tide dependent service such as that run by the Calstock Ferry primarily for leisure may be replicated, a service for commuting and other purposes, which would require a fixed timetable independent of the tide and weather conditions, would not be feasible.

Millbrook is in practice already served by the Cremyll Ferry with bus links either side. Due to tidal restrictions the closest a regular ferry service could get to Millbrook would be to a jetty at Southdown. Road access would be poor and the final section would be over private land. A service from Southdown would affect the viability of the Cremyll Ferry and the bus service which links the Cremyll Ferry to Kingsand /Cawsand. If a link to Southdown were to be added link to the Cremyll Ferry journey, the current half hourly schedule could not be maintained.

A service linking Millbrook / Cremyll to Torpoint or Saltash would have limited appeal due to the remoteness of the employment areas of the latter from the waterfront. There was a suggestion at one stage to provide a cycle path linking Millbrook to Torpoint around St Johns Lake. This would be a significant improvement over the present on-road route and would pass HMS Raleigh and the Trevol Business Park, both of which provide local employment for Millbrook residents.

Millbrook Parish Council did not respond to the questionnaire.

Cremyll

The existing ferry service is successful and has the potential to attract additional passengers if landing facilities at Cremyll are improved. Citybus service no.34 to Derriford Hospital connects with the Cremyll Ferry at Admirals Hard. The Cremyll Ferry could offer a better service to the City Centre and an almost equivalent service to link with the bus service if it landed at the inner harbour of Millbay Docks (Trinity Pier would be too remote). This might also be advantageous to the operator as the location within a regenerated water front area could be more attractive to visitors. However there are disadvantages with this proposal:

- . • The ferry would not serve Marine Projects or Royal William Yard and would be further from the socially deprived areas of St Peters Ward. A relocation from Admirals Hard to Millbay would therefore not satisfy the requirement to enhance social inclusion.
- . • A car parking area for visitors to Mount Edgecumbe Country Park would need to be accommodated within the Associated British Ports plan for the redevelopment of the dock area.
- . • The occasional scheduled Brittany Ferry movement would upset the timetable.

An alternative whereby the Cremyll Ferry served both Admirals Hard and Millbay with seasonal links to Mutton Cove could be feasible. However, a second or larger vessel would need to be introduced to offset a reduction in frequency and capacity in summer months. There would have to be a large increase in passenger numbers to justify introducing a second vessel on a permanent basis.

Extending the Cremyll service to the Barbican, while it may bring some City Centre and Cattedown employment areas closer, is likely to extend the journey time for the majority of City Centre employees.

Kingsand / Cawsand

Kingsand / Cawsand over the years has become a retirement / second home settlement with a steadily declining resident and younger age population. This trend is confirmed by population statistics as follows:

Year	Total Population
1981	1120 persons
1991	1045 persons
1998	960 persons

Age profile of the Parish of Maker and Rame, which includes Kingsand / Cawsand, compared with the Caradon Area:

	0-15 years	16-64 years	65+
Caradon	20.2%	61.4%	18.4%
Maker with Rame	13.4%	55.8%	30.8%

The number of customers for a regular commuter service between Kingsand / Cawsand and a landing point convenient for the City Centre is therefore considered to be small and unlikely to grow over time. Other disadvantages include the potential adverse effect such a service would have on the viability of the Cremyll Ferry and the fact that the sea state on the journey can also be unpleasant.

A number of Parish Councillors replied individually to the questionnaire. The general tenor of the reply was that the existing Cremyll and Torpoint ferries should be improved and there was less than unanimous support for a service direct from Cawsand. There was a fear that the latter would affect the viability of the Cremyll Ferry.

5.3 Local Ferry Services – Plym and Cattewater

Plymouth East End

Plymouth East End is also subject to an ongoing regeneration study. This area comprises a number of uses including significant residential development and in parts, has benefited from recent investment. Between the housing area and waterfront is a wide industrial/business belt. The ad hoc development pattern has however led to a number of problems in terms of conflicting development uses within close proximity. The study seeks to provide a better sense of community in the area, more sustainable employment opportunities, a reduction in the detrimental impact of transport and protection and enhancement of the area's green areas. The area encompasses the Cattewater waterfront extending from the National Marine Aquarium to the Laira Bridge.

A marine technology and science park has been suggested for Coxside, adjacent to the current National Marine Aquarium and the potential Centre for Marine Excellence visitor attractions. Although the proposal is at a relatively early stage and there are continued discussions about the site, it is planned to create 200 jobs. Some new housing (100 apartments) is included in the scheme along with research laboratories and business units. The Theatre Royal has recently developed a rehearsal and back-stage facility at Cattedown, opposite Hooe Lake.

With the exception of the potential Centre for Marine Excellence on a site adjoining the National Marine Aquarium, the nature of the likely development adjacent to the waterfront (commercial, industrial) is considered unlikely to significantly change demand for water transport in the area.

The residential area is well served by buses and non-leisure use of a water transport service by the residents of this area is considered unlikely. In the reverse direction a comprehensive service to the industrial area may attract some custom particularly from the east side of the Cattewater. Since parking is generally available, commuting customers from Cornwall are likely to be low in number.

Mount Batten

The Mount Batten Water Taxi links with First Western National service No.7 which connects Oreston, Plymstock, Hooe, Radford and Turnchapel. In its reverse direction, service No.7 travels to the City Centre and Derriford Hospital. In a sense therefore the bus service competes with the water taxi service and offers a single mode journey (see section on Mount Batten Water Taxi). However, patronage of the Mount Batten Water Taxi is increasing and the operator has sufficient confidence to invest in a new vessel. On the Barbican side, Citybus service No. 25 runs every 6 minutes to the City Centre. Parking is currently free at Mount Batten.

Turnchapel, Hooe & Oreston

The construction of additional landing stages at Turnchapel, Hooe Lake and Oreston Quay would open up the opportunity to use water transport to an increased number of walking / cycling passengers. However, there would be no bus and little car interchange at these locations due to the access constraints and lack of parking. Potential users would therefore be limited to residents in the vicinity of the landing stages and cyclists. Nonetheless, it is considered that services in this area could be viable when the proposed residential developments have been completed.

These landing stages could be served by an independent service or an extension to the current Mount Batten Water Taxi service since the relatively short distances involved would not adversely affect the frequency of the service.

Sutton Harbour

The Local Plan includes four Strategic Opportunity Sites in Sutton Harbour. These promote a significant degree of residential development as well as opportunities for waterside access, hotel, retail and leisure uses. Employment uses are likely to be small scale and there is considered to be little potential for commuting. In the longer term there may be sufficient demand for a small-scale boat service within Sutton Harbour.

The Sutton Harbour Company believe that consideration should be given to the provision of a new landing stage within Sutton Harbour rather than Phoenix Wharf as currently proposed by Plymouth City Council. A landing facility would be cheaper to construct inside the harbour and would be easier to use since the tidal range is maintained between 3.5m and 5.5m (the range outside the harbour varies up to a maximum of 4.7m). The landing stage could be located closer to the focal point of the other Barbican attractions and closer to the City Centre.

There are however a number of disadvantages. Vessels would have to lock in and out when water levels outside the harbour are outside the 3.5m to 5.5m range, whilst the footbridge would need to be opened at every passage. The Sutton Harbour Company would expect a payment for usage and it may be difficult to persuade operators to relocate from traditional facilities that are relatively inexpensive. Each controlled passage through the lock would add around 5 minutes to the journey which may be crucial for ferry services. Coach access is likely to be a greater problem than at Commercial Wharf / Phoenix Wharf. Overall, the disadvantages are considered to outweigh the benefits.

5.4 Summary

A total of 91,325 people live in the Plymouth Wards and Cornish towns with water frontage within the study area. These same areas provide 54,600 jobs. The wards and towns do however cover large geographic areas and consequently a large proportion of residents and workplaces are located some distance from suitable ferry landing facilities.

The decline over the past 50 years in the concentration of employment opportunities in the City Centre and Dockyard in particular has served to reduce the attractiveness of water transport as a means of travelling to work. Water transport is clearly less suited to travel to the outlying employment areas of Plymouth such as Derriford, Estover and Langage for example. Increased car ownership and the comfort and convenience in its use are also powerful factors against walking down wet and windy slipways and waiting for connections.

Furthermore, public transport achieves good penetration of the communities in Plymouth and the towns in South East Cornwall. A Water Transport Service serving these communities would have difficulty competing in time and cost with the bus services and whilst there is not a surfeit of passengers it does not seem sensible to share them and reduce profitability / viability or increase public subsidy.

The biggest disincentive to the use of Water Transport for commuting and other non-leisure trips is the need to change mode, particularly where a single mode trip can be achieved. Given that a good bus network currently exists and water transport is almost certainly going to involve a longer and more expensive journey, the conclusion is that the first choice for a mode switch for a from the private car would be onto the bus.

The Local Plan identifies capacity to build nearly 5,000 new dwellings in the City. A major proportion of these are identified for waterfront sites that are the subject of regeneration initiatives, including Devonport, The East End, Hooe and Oreston, and Millbay and Stonehouse. These developments therefore have the potential to increase demand for water transport.

Following consideration of each of the main residential centres, the following services have been identified as having future potential.

Note that services to visitor attractions and areas for recreation are considered in the following section of the report.

- **A service linking Turnchapel, Hooe and Oreston with the Barbican.** The introduction regular service from these locations would open up the opportunity to use water transport to a number of walking and cycling passengers. It is unlikely that the service would be viable ahead of the completion of the planned residential developments in the area. The service could run as an extension of the Mount Batten Water Taxi since the relatively short distances involved would not adversely affect the frequency of service.

- **A service from Millbay to locations in the Western Sound and Hamoaze.** There may be sufficient future demand for a seasonal/weekend service for residents. In the reverse direction Millbay would be a point of arrival for travel to the City Centre. Viability would be dependent upon the progress and nature of the development in the Millbay area.

- **A service from Mutton Cove and North Corner to Cremyll.** Again there may be sufficient demand for a seasonal/weekend service for residents. Viability would depend upon the progress of the Devonport Regeneration Project.

- **A service on a circular route serving Millbay, Cremyll, Royal William Yard and Mutton Cove.** This represents an alternative to the previous two services.

As all of the above proposals are dependent upon the progress made on a number of development projects they constitute medium (5 to 10 years) or long term (>10 years) projects. The project at Mutton Cove could be brought forward as there is already an established community in the area.

It is considered that there will be insufficient demand in the foreseeable future for new or enhanced services from other residential areas in the Sound and Estuaries.

1. **6.0 FUTURE DEMAND FROM TOURISM AND RECREATION**
2. **6.1 Introduction**

This section reviews estimates of existing current tourism and recreation use of the study area. It then uses available forecasts, the consultation process and the consulting team's experience to generate a view of the likely future demand for water transportation services in the Sound and estuaries. The section is set out as follows:

- . • Current Tourism Activity – covering visitor and resident populations, visitor attractions, events, cruise ships and informal recreation
- . • Trends and Forecasts – review of likely broad changes in visitor behaviour
- . • New Tourism and Leisure Developments – assessment of the specific impact of planned developments in the study area
- . • Estimates of Future Water Transportation Use

6.2 Current Tourism and Recreation Activity

In tourism terms Plymouth is mainly a destination for short breaks, business trips and day visits both from home and from holiday accommodation outside the City. While there are some longer holiday trips made to the City, longer trips are more likely to be made to locations elsewhere, such as the South Hams or Caradon. There are also visits by friends and relatives to Plymouth residents, including to MoD staff, and the Brittany Ferries service will also generate some staying visitors.

For leisure visitors the principal attractions are the public and private sector opportunities on the Hoe, the Barbican and the City Centre retail area. There are also opportunities to explore adjacent areas such as the Tamar Valley, Mount Edgecumbe and beaches at Jennycliff and Bovisand. The National Marine Aquarium in particular has helped raise the profile of the City as a day and short break destination.

The catchment area within one hour's drive time takes in Caradon, part of North Cornwall, West Devon, South Hams, Torbay and part of Teignbridge. Exeter is just outside this catchment. The total resident population in the catchment is approximately 785,000 (1998 estimates, ONS) and the total staying visitor population is taken as 5.4 million. Visitors will be in the catchment for an average of 4.8 nights with a seasonal pattern peaking in August (United Kingdom Tourism Survey 2000 and International Passenger Survey 2000).

Resident and Visitor Populations within One Hour's Drivetime

Area	Resident	Staying Visitors
Plymouth	253,000	787,000
Caradon	81,300	468,000
North Cornwall	80,700	722,000
West Devon	47,500	214,000
South Hams	80,200	930,000
Torbay	123,000	1,525,000
Teignbridge	119,400	797,000
Total	785,100	5,443,000

Source: ONS, Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in Plymouth 2001, Economic Impact of Tourism in West Devon 1996, Economic Impact of Tourism in South Hams 2001, Economic Impact of Tourism in Torbay 1995 and Economic Impact of Tourism in Teignbridge 2000.

Visitor attractions in the study area are listed in the table below, with further information in the following paragraphs. The locations of the attractions in relation to the waterfront are shown on Plan 1.

Attraction	Location	Visitor Numbers	Year
Antony House & Gardens	Torpoint	18,000	2000
Barbican Glassworks	Barbican	Not available	
Buckland Abbey	Yelverton	51,402	2001
City Museum & Art Gallery	City Centre	64,300	2001
Cotehele House & Gardens	Tamar Valley	75,000	2000
Crownhill Fort	N. Plymouth	25,000	2001
Elizabethan House	City Centre	4,800	2001
Garden House	Buckland	38,573	2001
Guide Friday/City Sightseeing	Plymouth	Not available	
Mayflower Centre	Barbican	Not available	
Merchants House	City Centre	5,050	2001
Morwellham Quay	Tamar Valley	50,000	2001
Mount Batten Centre	Mount Batten	67,000	2001
Mount Edgumbe House & Gardens	Mount Edgumbe	250,000	2001
National Marine Aquarium	Barbican	425,000	2002
Plymouth Dome	Hoe	100,000	2002
Plymouth Gin Distillery	Barbican	5,200	2001
Plymouth Naval Base Museum	Devonport	40,000	2002
Prysten House	City Centre	375	2001
Royal Citadel	Hoe	500	2001
Saltram House	Plym Estuary	57,000	2000
Smeaton's Tower	Hoe	100,000	2002
Note: Visits have now ceased to the Citadel. Where 2002 figures are presented, these are consultees' estimates based on numbers to date.			

Source: South West Tourism and personal contact.

Antony House and Woodland Garden - Antony House comprises an eighteenth century house and formal gardens which overlook the Lynher River. Antony Woodland Garden lies adjacent to the House and incorporates over 100 acres of garden much of which borders the Lynher estuary. Whilst the House and formal gardens are managed by the National Trust, the woodland gardens are not although entry is free to members when the House is open. The House is open three days per week from the end of March until the end of October although also on Sundays during June, July and August. The Gardens are open the same three days per week as the House but in addition are open during weekends.

There is no quay at the site however Jupiter Quay, a MoD owned quay, is located adjacent to a track from which direct access to the Gardens and House is possible. Whilst the National Trust would be keen to see public access to the property improved, there are no current proposals.

Generally access to the site is by private transport although it is also accessible by bus from Plymouth.

Marketing for the attraction is carried out in the usual tourist and National Trust outlets and there are also posters on the Torpoint Ferry. Some joint marketing is undertaken with the Tamar Railway Valley line.

Links between Antony, Mount Edgecumbe and Cotehele would be welcomed. There is a possibility that the sites could be linked by water transport although it is envisaged that this would be a specialist trip rather than a regular public service.

Blue Badge Guides

There are a number of Blue Badge Guides providing guiding services to individuals and particularly groups. Much of the activity relates to guiding coach parties staying in places such as Torbay. Typical itineraries run from the City centre to the Barbican, Victorian Millbay, Royal William Square, through Devonport Docks, maybe under the Tamar Bridge and then back to the City centre. There is a growing market for tours for cruise ship passengers docked in Plymouth, either touring around Plymouth or further afield.

Cotehele

Cotehele is located along the River Tamar, approximately one mile from Calstock. The National Trust managed site comprises the House, Mediaeval Barn, Mill, Gallery and a historic vessel owned by the National Maritime Museum. The Mill has been restored to working condition and at the Quay, restored old buildings house an art & craft gallery, the Museum and a licensed tea room. In addition the restored Tamar sailing barge Shamrock is moored alongside.

A network of footpaths throughout the estate provides a variety of riverside and woodland walks with a high nature conservation and industrial archaeology interest. The Mill is accessible through woodland alongside the Morden stream. There are also plans to extend the path network to the south of Cotehele House to take in the Hayemmarsh area. Plans are afoot to revert this area to a tidal location by creating breaches in the embankment. The area is important in terms of birdlife and the new footpath will permit increased opportunities to view these birds.

The House is open seasonally from the end of March until the beginning of November however the Gardens are open year round. Admission is charged for the House and Garden and Mill. All facilities close at 5pm.

Cotehele is presently accessible by tidal water transportation which moors up at the quayside. The trips are considered generally successful and there are plans to extend the service and/or use a larger boat in the future (see consultations with boat operators). Calstock is also accessed by river and footpaths run along the riverside direct to Cotehele. Otherwise, the House is accessible solely by car as bus services do not go further than St Dominick, some distance away by foot.

The National Trust is generally supportive of any measures to increase the potential of water transport to the site. The ability to access the quay is however severely constrained by the tides and the National Trust consider that it is this issue which places most water transportation restrictions upon the site. The potential to increase access to land south of Cotehele and to increase the feasibility of circular walks are however particularly supported.

Crownhill Fort

Crownhill Fort is not adjacent to the waterfront, but it has a strong thematic link to the Naval Base. When the Naval Base Museum development (see below) is complete, there will be the opportunity to build joint visits and a joint transport system, with visitors arriving at the Naval Base Museum by boat and proceeding to Crownhill Fort by bus.

Morwellham Quay

Morwellham Quay attracts approximately 50,000 visitors a year. The organisation has arrangements with the Calstock Ferry Company to bring visitors from and back to Calstock by boat on the Tamar. Although the attraction is open year-round there is a typical seasonal pattern with most visits between Easter and October, and particular peaks in the school holidays. Morwellham attracts many school trips, mainly 9-11 year olds, with particular emphasis on the curriculum rather than purely entertainment.

Mount Batten Centre

The Mount Batten Centre provides sailing and water sports for visitors and local residents. The activities are provided in association with a number of providers and affiliated clubs who are based at the Centre, and facilities include accommodation for visitors, catering, and conference/function rooms. Apart from the year-round conference business, there is a seasonal visitor pattern with near-capacity use in July and August. Group visitors will typically come by coach while independent visitors are most likely to come by car or the Mount Batten Water Taxi. Divers are the main user group, followed by canoeists, although there can be numerous spectators at events. 77% of the 67,000 visitors in 2001 were local people, with the remainder classified as tourists (although not all staying at the Centre). The Centre hosts a programme of events such as the Port of Plymouth Regatta, the European Water Ski Championships and Dragon Boat Racing Area Heats.

Mount Edgecumbe House and Country Park

Mount Edgecumbe Country Park covers 865 acres and is owned by Cornwall County and Plymouth City Councils. The Park is located in the Parish of Maker with Rame within the Rame peninsula and is largely surrounded by water. The park is located on a promontory comprised of large areas of woodland and gardens which are open daily free of charge, year round. The House and Earls Garden are sited away from the coastline and enjoy views across Plymouth Sound. The House is open seasonally and there is an admission charge. 9,000 of the Park's 250,000 visitors in 2001 visited the house.

The site is accessed mainly by car although the Cremyll Ferry allows access to the Park from Stonehouse in Plymouth and the South West Coast Path follows the coast from Cremyll around to Cawsand and Whitsand Bay. Alternatively, Cawsand is also accessible via a ferry from the Barbican and park roads and footpaths allow access back into Mount Edgecumbe Park from the ferry.

Recently a licence was acquired for the solemnization of marriage within Mount Edgecumbe House. No facilities exist within the House for a subsequent reception and the opportunity exists for this event to be offered by the pleasure boat operators. The difficulty of access to the Cremyll landing facility needs to be addressed.

A 'Vision for Mount Edgecumbe' is presently being considered and will entail a consultancy study. Aims of this work include the improvement of access between the country park to Cawsand, Kingsand and Millbrook, enhancement of the Cremyll ferry surrounds and the provision of integrated transport information and improved facilities at Cremyll.

National Marine Aquarium

The National Marine Aquarium has recently (June 2002) opened an extension to the original facility and it is anticipated that visitor numbers will stabilise at 400,000 to 450,000 visitors per annum. Linked to the distribution of visitors to the region, the pattern of visitors to the Aquarium is seasonal with some 50% of visits in June to September and 31% of visits in July and August.

Naval Base Museum

The Plymouth Naval Base Museum is based within the Devonport Naval Base security cordon. The museum makes use of the substantial collections held by the MoD in Plymouth, including the planned addition of the nuclear submarine HMS Courageous. The current arrangements for visitors are an interim measure until larger and more permanent arrangements are made (see *New Tourism and Leisure Developments* sub-section below). At present, groups must pre-book visits. Pre-arranged groups visit by coach occur throughout the year and although there is waterside access, landing is not allowed without arranging security checks.

Plymouth Dome

Plymouth Dome is responsible for the operation of Smeaton's Tower and operates a joint ticket arrangement. Approximately 40% of the tickets for Smeaton's Tower are joint tickets. Visitor numbers to the Dome have risen from 70,000 per annum to 100,000 (falling from a peak of 130,000) and it is considered that this level of visitors is sustainable. 70% of the visitors are independent and 30% are school groups. As part of the Dome's efforts to build the school's market it has developed a one-stop shop facility for booking school and other group trips and this provides an indication of other activities that group visitors to the Dome are interested in pursuing. While many will have the Dome as their only formal attraction on the trip, the most common other element will be boat cruises to Devonport, with 25% of the groups using the booking service for their trip to the Dome also taking a cruise.

Many of the Dome's group visitors will arrive by coach or bus. The majority of groups will be from the Plymouth travel to work area although there will be minorities from elsewhere, such as Torbay or activity centres on the Moor. The Dome is keen to explore joint ticketing arrangements with other tourist businesses.

Plymouth Gin Distillery

The Plymouth Gin Distillery operates a guided tour and a shop selling gin and associated merchandise. At present 5,200 people undertake the tour, and more simply visit the shop. Visitors are mainly people staying in hotels in Plymouth, language school students and coach-borne visitors from Torbay. While the shop is open year-round, the tours operate Easter to October (although moves are being made to extend the times when tours are generally available). The lack of coach drop-off points in the Barbican is an issue and is felt to restrict visits. The Distillery is keen to pursue joint ticketing arrangements.

Plymouth Mayflower

The Plymouth Mayflower opened in early 2002, with a designed capacity of 100,000 to 150,000 visitors per year. However, visitor numbers were slow to build up, possibly because of a lack of brand differentiation between it and Plymouth Dome and it has not reopened in 2003. Other uses for the building are being considered. Other formal recreation opportunities include the Theatre Royal and Plymouth Pavilions. The Theatre Royal is developing rehearsal and storage facilities adjacent to the Plym Estuary near Cattedown.

Saltram House

Saltram House is located to the eastern side of the River Plym, approximately three miles to the east of Plymouth City Centre. The House is located within a landscaped park and is open regularly from the end of March to the beginning of November. There are however some interim opening times which relate to the tea-room and gallery.

The site is mainly accessed by private transport however the site is accessible by bus although this is not direct and a ¾ mile walk to the House is necessary. The property also has the advantage of lying close to the Plym Valley Path and Cycle route which runs to the north of the City, up though the Plym Valley. Reduced entry fees are available for those arriving via public transport.

Marketing of Saltram is carried out via the usual outlets and National Trust avenues. Website information provides useful information on access and provides links to the Sustrans cycle network maps.

The National Trust is keen in principle to support non-car access and there is a quay on the Laira and the potential needs to be explored. The impact of tidal constraints on providing regular access is considered to be one of the largest hurdles to water transportation access to the site.

To maximise access any vessel would need very shallow draught and water jet propulsion. The Cattewater Harbour Master is concerned about the difficulty of rescuing any passenger stranded on the extensive mud flats should a vessel stray from the channel on a falling tide.

A suggestion was made during the consultation process for a fast hovercraft service to overcome the problem of lack of draught. However, such a mode is considered incompatible with the environment of the estuary.

6.3 Events

Plymouth hosts a number of events that attract significant numbers of spectators. Plymouth Navy Days are held every two years, attracting 60,000 people over three days. The Plymouth 2002 Maritime Festival held between July and September, included the following events:

Event	Location
RYA South West Youth and Junior Championships	Sound
Bosun National Championships	Sound
Laser National Championships	Sound
Osprey National Championships	Sound
Racing for the Plymouth Offshore Points Series	Sound
Silhouette Rally	Sound
Diana Princess of Wales Disabled Challenge Race	Sound
Regattas at Torpoint Mosquito and Cawsand Bay Sailing Club	Sound
Fisherman's Family Fun Day and Trawler Race	Sound/Barbican
Breakwater Swim	Sound
Maritime Paintings Exhibition	Museum & Art Gallery
Naval Base Open Days	Devonport
Maritime Walking Tours/Lunch	Hoe/Barbican
Mediterranean Style BBQ/Music	QAB
Armed Force Show	Hoe
Maritime Music Festival	Barbican
Music of the Night	Citadel

Event	Location
Festival Food Fair & Fish Supper	QAB
Raft Race	Sound
Scott Bader Regatta	Sound
Classic Boat Rally	Mount Batten/Sound
Charity Dragon Boat Racing	Mount Batten
National Firework Competition	Mount Batten
European Waterski Championship	Sound/Tamar
F1 Power Boat Racing	Sound
Royal Western Yacht Club 175th Anniversary	Sound

The Maritime Festival brochure contained space for advertising but none of the local cruise ship operators took advantage of this to promote their business as providing a perfect opportunity to view or access many of the events.

In addition to the Maritime Festival, in 2002 there was a substantial programme of events with a particular water or water location focus. These included:

Event	Location
Camellia Study Day	Mount Edgecumbe
Fisher McKenzie Exhibition	Mount Edgecumbe
Haynes Two Day Classic Tour	Hoe
BMX and Skaters Day	Hoe
Asymmetric Championship	Sound
Plymouth Bus and Vehicle Rally	Hoe
DML Plymouth Half-Marathon	Hoe
SW Schools Sailing Regatta	Sound
Plymouth Multihull Grand Prix	Sound
Golden Jubilee Race	Sound
Lord Mayor's Day	Hoe
Sports Bug	Mount Batten
Gig racing regatta	Cawsand Bay
RAF & Allied Forces Commemorative Service	Hoe
Music in Earls Garden	Mount Edgecumbe
Devon Fire and Rescue Service	Hoe

Plymouth Mega-Ride	Hoe
Summer Jazz	Saltram
Radio 1 Big Sunday	Hoe
Summer Fayre and Classic Car Show	Mount Edgecumbe
Miracle National Championships	Sound
Sealed Knot Civil War Re-enactment	Mount Edgecumbe
Open Air Shakespeare	Mount Edgecumbe
International Street Theatre Festival	Barbican

Event	Location
Robin Armstrong Wildlife Artist	Mount Edgecumbe
Customs and Excise Sailing Championships	Sound
MG Car Rally	Hoe
Final Fling Open Meeting	Hoe
City Council Bonfire and Fireworks	Hoe
Remembrance Day Service	Hoe

There is a seasonal pattern of events, with most happening during the summer months. Of the 72 events listed on the Tourist Information section of the Plymouth City Council website, 6% are between January and March, 32% between April and June, 44% between July and September and 18% between October and December.

6.4 Cruise Ships

Plymouth received 10 cruise ships in 2002, which docked in the Sound, Millbay or occasionally, Cattewater. In 2003 the number is expected to rise to at least 12, of which 5 will be first-time visitors. Millbay is the preferred berth, but if it is being used by Brittany Ferries, ships will typically berth in the Sound near Jennycliff. In most cases the passengers will be ferried to Millbay by the ships' own tenders which make use of one of the Ro-Ro linkspans. There is no sheltered waiting area or covered walkway. A large parking area, in very close proximity, is available for coaches. Associated British Ports lay on a free shuttle bus service to the City Centre. This is taken up by about 50% of passengers landing while the remainder board coaches for day trip destinations in Devon and Cornwall, including Dartmoor, Buckland Abbey, Mount Edgecumbe and Polperro.

The Barbican's facilities are not considered adequate on safety grounds, however the new pontoon at Phoenix Wharf should rectify this situation, although coach access will remain a problem. The Cattewater Harbour Commissioners charge a landing fee for each cruise ship passenger landing at Phoenix Wharf. Consultations indicate that there may be some opportunities for local craft to ferry cruise passengers subject to safety and quality reassurances.

There have been discussions about the provision of new cruise berths. Maritime Plymouth (a consortium of marine interests) propose a facility at Dead Man's Bay in the Cattewater while Associated British Ports suggest the facility is located in Millbay Docks. It is understood that both these proposals are costed at over £20 million each and are at an early stage of discussion. Consultations indicate that such facilities would have a significant positive impact in the number of cruise ship visits, although the ships would have to pay berthing fees in place of free mooring in the Sound.

Plymouth is one of the seven ports forming Destination South West, which aims to triple the volume of ships using the South West by 2005. The initiative includes funding from EU Objective 1 and Objective 2. Destination South West operates through dialogue with operators, business to business marketing and a presence at the Sea Trade Miami trade exhibition.

In 2001 there were an estimated 10.4 million cruise passengers globally, of whom about 7 million were from the USA. The events of September 11th have had an impact on the cruise ship market and it is unclear when the market will settle.

Destination South West estimates that average spend per passenger onshore is £50, although this may be in the surrounding area as well as Plymouth and will be with travel companies and visitor attractions as well as with retailers and caterers. The average number of passengers is 1,000 per ship, ranging between 400 and 2,400.

Consultations indicate that there are opportunities for water-borne local trips for cruise passengers provided there is a strong destination for the trip itself. Examples include the interest in travelling to Totnes by boat from Dartmouth from cruise ship passengers. Other opportunities for water transport may spring from a lack of quality coach capacity at times of peak demand (e.g. when there are cruise ships at Plymouth and Falmouth simultaneously), providing a requirement for alternative ways of moving passengers around. Consultations also indicate the role of cruise ships in reinforcing a maritime focus for Plymouth.

Estimates vary on the proportion of cruise ship passengers using organised trips against those making their own arrangements from 50:50 to 66% undertaking an organised tour. 90% of those not undertaking a tour will leave the ship to make their own arrangements. Assuming therefore that 40% of the total passengers make their own independent arrangements for leaving the ship when in port (4,000 people based on 10 ships with 100 passengers each) and if say 10% would utilise water transportation this would amount to 400 passengers. The market for passengers making independent arrangements is therefore small.

The cruise ship operators naturally wish to maximise the organised tour business. There may be scope to provide operators with organised excursions by boat with a combined attractions ticket, thereby capturing a larger market.

6.5 Informal Recreation

In addition to the formal recreation opportunities offered by the visitor attractions in the study area there are a number of sites for informal recreation. The locations of the informal recreation opportunities within the study area are shown on Plan 2. The following paragraphs discuss these opportunities, firstly dealing with the facilities crossing the whole study area, and then individual locations on an east to west basis.

South West Coast Path

The Waterfront Walkway is part of the South West Coast Path between Royal William Yard and Jennycliff. There are parts of the existing water frontage that do not have public access and the route has to go 'inland' away from the water's edge. These are at Royal William Yard, Eastern Kings, Millbay Docks, the eastern side of Sutton Harbour, Coxside, Oreston, Hooe and Turnchapel. The City Council's aspiration is to route the official walkway alongside most of these missing links of the water frontage in order to make the walk more enjoyable.

Whilst surveys have taken place to determine usage of the coast path, no survey stations were placed within the Study area, the nearest being Rame Head and Wembury. As such it has not been possible to determine demand along the route.

National Cycle Network

Sustrans operate as a sustainable transport charity which works on practical projects to encourage people to walk, cycle and use public transport in order to reduce traffic and its adverse effects. Sustrans' flagship project is the National Cycle Network which has created 10,000 miles of routes across the UK. In addition Sustrans works on the 'Safe Routes to Schools', 'Safe Routes to Stations', 'Homezones' and other responses to transportation and environmental challenges.

Plymouth is accessible via the National Cycle Network and forms part of the Devon 'Coast to Coast' route from Plymouth to Ilfracombe (NCN 27). The route enters Plymouth from the east of the City, alongside the River Plym before passing eastwards across the centre towards Devonport. The route is generally on road but with dedicated cycle tracks.

As part of this network plans are afoot to convert the redundant Laira railway bridge on the east side of Plymouth and to complete a badly needed off-road section of cycle path between Plymouth and Tavistock. This will involve an underpass at the A386 and a new river crossing of the River Tavy. Also in progress at present are schemes to upgrade the Plym Valley Path to modern National Cycle Network standards. In addition work has started on assembling a route over the steep sided Walkham Valley (with a new bridge) to Horrbridge. Ultimately it is hoped this will connect to the Plym Valley Path.

Within the study area the sites for informal recreation, identified from east to west are:

- . • Bovisand
- . • Jennycliff
- . • Mount Batten
- . • Barbican
- . • Hoe
- . • City Centre
- . • Plymouth Sound
- . • Mount Edgecumbe
- . • Cremyll
- . • Cawsand
- . • Tamar Valley

The Sound and estuaries also provide sites for informal recreation for those with access to watercraft and launching facilities.

East of the Plym

Jennycliff and Bovisand beaches operate primarily as facilities for residents rather than visitors, although there is a caravan park at Bovisand.

Mount Batten offers substantial public open space very close to the City Centre (via the water rather than by road), with commercial facilities to service the use – Mount Batten Centre, Mount Batten Hotel, bus services and a car park. The existing Mount Batten Water Taxi service provides a direct link with the Barbican and according to information received during the consultation, leisure use of Mount Batten is growing.

Other locations to the east of Plymouth which have been noted as potential water transportation routes include access around the coast as far as the Yealm (Newton Ferrers) and the Avon (Bigbury and Bantham). The possibility of a summer ferry between Salcombe and Plymouth was also raised.

Plym to the Tamar

The 1991 Plymouth Visitor Survey indicates that almost all visitors to the City use the Hoe, Barbican and the City Centre shops, and consultations confirm that this is still the case. Consultations also indicate that amongst the main triangle of the Hoe, Barbican and the City Centre Shops, visitor circulation is impeded by the perception of distance between the three areas (although they are in fact close together).

Recent public product improvements have been made in all the three main visitor areas, particularly in the Barbican. Consultations indicate that the lack of a coach drop-off and collection point restrict use of the area, particularly amongst those visitors less able to walk any distance.

Plymouth Sound provides a substantial leisure asset. Consultations indicate that in comparison to other waterside locations relatively little use is made of the Sound and that despite the strong maritime traditions, the focus of the City is away from the waterfront. The topography between the City Centre and the sea may be in part responsible for the perception, along with the development of new housing and employment uses on the northern side of the City.

The Royal William Yard will have residential and commercial uses, including restaurants, some small shops, a hotel, a small scale cultural/visitor centre and some public open space. It is anticipated that there will be informal leisure use of the area, but that the development will not be open and occupied until at least 2005. A link is planned from Royal William Yard to Devil's Point, which will encourage pedestrian leisure use. Landing stages to accommodate full access by the public will be required as part of the development.

Mount Edgecumbe to Rame Head

Mount Edgecumbe Country Park provides a variety of informal recreation opportunities as well as a venue for events. There are beach areas at Kingsand/Cawsand. Proposals for a jetty have been discussed to facilitate access by visitors in their own boat as well as enhancing the ferry service.

The network of footpaths includes the South West Coast Path route as well as a network of other paths offering the opportunity for circular routes.

Hamoaze

There are relatively few opportunities for waterfront informal recreation in the Hamoaze because of the MoD although there are paths north of Torpoint towards Antony House and south of Saltash.

Tamar Valley

The Tamar Valley has a good network of footpaths. The Tamar Valley Discovery Trail is a 35 mile strategic walking route linking Plymouth and Launceston with a network of linking footpaths and links to the rail line and the passenger ferry at Calstock. Local circuits have been developed to encourage exploration of local villages. There are also cycle routes such as the Bere Alston cycle route and the Lopwell link to the Plym Valley cycle trail.

Particular informal recreation locations are:

- . • Calstock – offering catering and a village environment as well as ferry access to Cotehele and Morwellham
- . • Weir Quay – bird watching, walking
- . • Cargreen – public house and village
- . • Lopwell – South West Lakes Trust is providing a visitor arts and wildlife centre
- . • Bere Ferrers – public house

There are many other potential landing places of varying accessibility around which informal leisure facilities could be enhanced or introduced, including:

- . • Gunnislake
- . • Okeltor
- . • Ward Hard
- . • Halton Quay
- . • Blaxton Quay
- . • Warleigh Quay

While the Tamar Valley Line service by Wessex Trains provides a valuable commuter link for Tamar Valley residents, it also offers the opportunity for walkers to build circular walks, including use of some of the ferry services. Use of the line has risen from 112,000 in 1998 to 121,000 in 2001, and further growth is expected through the new year-round Sunday service on the line. Although there used to be round-robin tickets these were discontinued because of administrative accounting difficulties for the train service, although consultations indicate that Wessex Trains would consider reintroducing the scheme. There are already through tickets on the line to Okehampton via bus services, using the Sunday Rover ticket. The proposed joint PCC/DCC bid for funding for the Drake Railway Line between Bere Alston and Tavistock, if successful, may provide greater opportunities / increased demand for combined water / rail trips.

6.6 Trends and Forecasts

Analysis of the regional and local trends (refer to Appendix D), along with the consultations undertaken as part of this study indicate that:

- . • There could be a further 190,000 staying leisure visitors in the city (including those visiting friends and relatives) by 2010.
- . • The growth in visitors from overseas, particularly from Germany and Holland, offers potential for water transport as part of a round trip combining walking and other forms of transport. Other nationalities, such as visitors from North America, are likely to be more interested in heritage- orientated opportunities.
- . • The trend towards short breaks offers opportunities for Plymouth as a city break destination.
- . • The anticipated increase in cruise ships will offer some limited opportunities for water transportation operators.
- . • The drop in the number of visitor nights accommodated in Torbay, which supplies day visitors from holiday accommodation to Plymouth, may have an impact on the number of day visitors. However there are major regeneration proposals for Torbay which may address this issue.
- . • The increased propensity for trips to visit friends and relatives will particularly benefit urban areas such as Plymouth, although it will have implications for the way that visitor-orientated water transportation (along with other leisure provision) is marketed
- . • Business tourism is relatively important in Plymouth, but this sector is unlikely to be significant for a water transportation system.
- . • Seasonality is an issue both in terms of the demand and supply, although there are indications that the pattern is gradually becoming less peaked.
- . • Plymouth fulfils a role as a 'day out' destination for visitors staying in surrounding districts and therefore marketing of any existing or future leisure water transportation will need to consider the issue of communication well beyond the City boundaries.

- There is relatively little visitor accommodation around the navigable stretches of the Tamar.
- There are opportunities for building the day visitor market from home.

6.7 New Tourism and Leisure Developments

Plymouth Naval Base Visitor Centre

Plymouth Naval Base Visitor Centre - It is planned to enhance the current interim museum arrangements substantially to provide a larger naval museum attraction with a target number of visitors of between 150,000 and 200,000 per annum. A feasibility study is being undertaken, but in advance of the study's findings, it is estimated that:

- The development will cost £12 million
- The project will be handed to the private sector in two years time to start the development
- Some 40,000 of the anticipated visitors will come by boat and that a visitors' pontoon will be part of the project
- The development will re-align the security arrangements for the Naval Base so that entrance to the museum is unrestricted.

The new museum development will hold special open weekends, with events forming part of the everyday opening.

The estimated visitor numbers would not be sufficient for a water transport dedicated service but could supplement a service from the Barbican to other landing points in the Western Sound and Hamoaze. The location of the landing stage for the Visitor Centre has not yet been determined.

Flagship Project

The New Deal for Communities Flagship Project will build on the tradition of maritime skills and will involve building local skills in marine crafts. The project will include visitor access to see work taking place (such as building or conserving boats). There are no estimates of visitor figures as yet. A feasibility study is in progress, and will cover issues such as the relationship with the adjacent Naval Base Museum and the need to maximise the benefits to the Devonport Community. The project will have waterfront access and its landing facilities are planned so that visitors will be able to arrive by boat. The feasibility study was due for completion by the end of 2002, with the project in operation by the beginning of 2005.

Centre for Marine Excellence

A Centre for Marine Excellence has been promoted as an extension to the current enlarged National Marine Aquarium on Coxside. While the current Aquarium delivers an insight into the natural marine world, the Centre would extend this to cover man's marine interaction. It is anticipated that this development could increase visitor numbers from the estimated current 425,000 per annum to the Aquarium to some 525,000 per annum for the joint project. The project is planned to be developed between 2003 and 2005. The Centre would share a common

management and secondary facilities (café, etc.). This development would be linked to an adjacent proposed marine technology and science park. Part of the proposed overall development site includes what is currently a residential area and there has been opposition to redevelopment.

It is hoped that the Centre for Marine Excellence will incorporate water transport access, and one scenario includes a covered embarkation point. This, combined with the use of a glass-sided vessel could help to overcome the effects of poor weather on the attractiveness of using this type of transport. It is anticipated that the route will include Royal William Yard and the Devonport Naval Base Visitor Centre as well as the Hoe and both sides of the Barbican.

Royal William Yard Visitor Centre

The proposed development at the Royal William Yard includes a Visitor Centre, covering the heritage of the area. However this is will be only a part of the potential use of the site by visitors. It is expected that the site will become a focus for people using the planned cafes, bars, restaurants and shops, and making use of the historic waterfront environment

Tinside Pool

Tinside Pool is being restored as part of a wider Hoe regeneration programme. Work has started on the pool and is due to be completed by summer 2003. The work at Tinside will bring the original lido development to modern standards with new filtration equipment etc, as well as adding a first floor restaurant with year-round use and a lighting scheme to raise the profile of the pool and of the Hoe itself. Site access and circulation is an issue, with little parking in the vicinity. Consideration is being given to extending the jetty so that water transport can be used. A Hoe Foreshore Regeneration Strategy has been commissioned, due to be completed in 2002. There are no estimates of current usage.

Informal Recreation

In the context of informal recreation the new developments considered are:

- As well as the visitor centre discussed above, the Royal William Yard will provide a new site for informal recreation and leisure (through cafes, bars, restaurants and shops, and an attractive historic waterfront environment) although redevelopment is still at a planning stage.
- Drake's Island offers potential as a recreation space although there is no indication of any plans at this stage for any activity on the island and access is restricted.
- Outline planning applications for development of land at Millbay Docks include hotel, leisure and marina elements.

It is considered likely that the redevelopments noted above will include public open space and

access to the waterfront, and that these changes will provide an incentive for visitors and residents to visit. It is not possible to quantify this impact, although it is possible to say that there will be more of an incentive for the leisure visitor to go to the western end of the Sound waterfront and that this is in contrast with the current known pattern of use.

6.8 Water Transport as an Attraction in its Own Right

It is important that water transport is seen as a visitor attraction in its own right. In many waterfront cities around the world water transport is promoted strongly as a visitor attraction and there has been investment in the shoreside infrastructure and support facilities. For many visitors the overall experience can be as important as the actual destination.

The Barbican is the main location for facilities for leisure water transport activity at present and the overall experience is relatively poor with old and unattractive landing facilities (Phoenix Wharf, Water Taxi pontoon), limited facilities for the disabled, limited sheltered waiting areas, a lack of centralised/coordinated ticketing and timetabling, older vessels and the environment is not particularly pleasant or attractive. There is clearly potential for significant improvement to these facilities.

6.9 Potential Visitor Numbers Using Water Transport

Given the lack of identifiable new routes, nor reliable information about the proportions of visitors who would use a water transport system, it has not been possible to map out a definitive vision for water transportation. However it is possible to make some qualified estimates for some of the locations based on the background research undertaken as part of this study.

As noted earlier in this section, the catchment area within one hour's drive of the study area has a population of 5.4 million staying visitors (Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in Plymouth 2001, Economic Impact of Tourism in West Devon 1996, Economic Impact of Tourism in South Hams 2001, Economic Impact of Tourism in Torbay 1995 and Economic Impact of Tourism in Teignbridge 2000) and 785,000 residents (1998 estimates ONS). From this catchment, estimates (Economic Impact of Tourism in Plymouth 2001) suggest that there are 6.9 million day visits from holiday accommodation and some 606,000 leisure staying trips in the City, plus 4 million day visits from home, totalling 11.5 million trips to the City, albeit with some repeat trips by the same individuals. The Plymouth Visitor Survey 1989 (latest available) indicates that 84% of visitors to Plymouth visit the Barbican (9.6 million trips) and 92 % visit the Hoe (10.6 million).

The Barbican

The Barbican area has been the subject of considerable enhancement and the new Aquarium-related developments will increase the attractiveness of the area. Consultations indicate that by 2005 the combined attraction visits to the Barbican (e.g. to the Aquarium and Glassworks) could amount to 600,000 visits per year (6% of the current 9.6 million estimated total number of visits to the Barbican area). Clearly the volume of visits presents opportunities to attract more people onto the water – even 5% of the total number of people visiting the Barbican would amount to 480,000 trips.

The Hoe

The Tinside developments will raise the profile of the seafront and the Hoe in particular. 92% of day and staying visitors use the Hoe (10.6 million). The setting is less conducive to embarkation than the harbour facilities at the Barbican, being more exposed, and the proximity to the Barbican would reduce the likely use. Furthermore, many of the visitors to the Hoe will also be visitors to the Barbican. Taking these factors into consideration, even 2% of the total visitor use of the Hoe would amount to over 200,000 trips.

Naval Base Visitors Centre

The proposed Naval Base Visitor Centre is expected to attract around 150,000 visitors per year. Water transport is included on the agenda for the Visitor Centre and it would seem reasonable to assume that 7.5% of visitors (11,250) might use a water transportation system, albeit with a likely seasonal pattern. The proposed adjacent New Deal Flagship Project may attract more visitors but the relationship between the two is not yet established and so no further numbers are assumed.

Royal William Yard

Royal William Yard developments will provide opportunities for formal recreation, but no formal estimates of visitor numbers have been made. However the profile of the developers (Urban Splash), the quality of the site, its facilities, and the planned visitor centre all suggest that the area will be attractive to visitors. We have assumed that 200,000 people per year will visit the site for informal recreation, and that 10% of them could use a water transport system – 20,000 users. It is likely that there will be some cross over with people visiting the Naval Base Visitor Centre and/or other attractions along the water front; say 50% of those arriving by water.

Other Regeneration Sites

Other regeneration sites such as Barne Barton, Millbay and the East End could all offer opportunities for informal recreation although Millbay's location on the Sound and proximity to the City Centre lends itself to recreation use assuming developments offer attractive visitor access and landing facilities. However there is no clear basis to make even preliminary assessments at this stage.

Cremyll / Mount Edgecumbe

Mount Edgecumbe already receives 250,000 trips, but it is thought that more are possible. There is potential for a link from the Barbican to Mount Edgecumbe but this is not practicable at present due to the limited berthing facilities at Cremyll. The development of new landing facilities at Cremyll could overcome this constraint.

The Upper Tamar Valley

There are no available estimates of current use of the wider recreation opportunities offered in the Tamar Valley. However, the network of services along the Tamar, and those to Cremyll and Cawsand/Kingsand, all demonstrate demand for water transport combined with walking and other outdoor informal recreation. There is evidence from previous initiatives that further development of services, facilities and marketing support will increase usage. As well as serving staying visitors (total just under 1.5 million staying visits in Plymouth, West Devon and Caradon), the area could act as a country park for the City (in a similar way as Mount Edgecumbe, which receives 250,000 trips per year). It would seem reasonable to assume that 5% of the 1.5 million staying visitors in this local catchment and 10% of Plymouth's 253,000 population could use the Tamar Valley (amounting to circa 100,000 visits per year), with 20% of those using the valley making use of water transport – amounting to 20,000 trips, albeit with a strong seasonal focus.

The seasonal service from the Barbican to Calstock has proved successful and it is felt that improved facilities in the Barbican linked with improved marketing could increase demand. The service is however limited to one return trip per day to suit the tides. The potential to stop at intermediate landing stages on the Tamar is limited by the lack of suitable facilities (which could be overcome) but more importantly by the limited time that passengers can spend in Calstock before the return trip must be made to the Barbican (to suit tide restrictions and speed limits). The increase in capacity could be achieved by the operation of additional vessels.

Estimated Visitor Demand - Summary

The various demand estimates may be summarised as follows:

Location	Number*	Timescale
Barbican	480,000	Current
Hoe	200,000	Short term
Naval Base Visitors Centre	11,250	Medium Term
Royal William Yard	20,000	Medium Term
The Upper Tamar Valley	20,000	Current
Cremyll / Mount Edgecumbe	>250,000	Current
Cruise Ships	400	Current

*NB Some of these trips take place already e.g. Barbican, Cremyll/Mount Edgecumbe

These early indicative figures above are substantially more than estimates of current usage of local ferries, water taxis and cruise boats. They are however indicative of scale only and would benefit from further testing, particularly when there are clearer ideas of what will be on offer at each of the sites. The opportunities at some of the sites are inter-related, particularly services from the Barbican/Hoe needing a destination e.g. Royal William Yard or South Yard – and therefore it is not appropriate to simply add the figures in the table together.

There are issues about integration with other transport systems/transport mode interchanges. For example, a lack of planning for visitor car parking and coach drop off points will render these estimates untenable. Furthermore, if these figures are to be realised there will be a need for:

- . • Water access to be built in to new developments.
- . • Substantial marketing support for water transportation and the destinations served, almost certainly with some public subsidy initially.
- . • High quality vessels offering good and poor weather capability and a reliable service.
- . • High quality landing stages within an attractive visitor environment.
- . • Reliable information on ferry times, ideally real time next ferry information.
- . • Planning in water access at the development stage of projects.
- . • Integration with the tourism/leisure offer at each location (e.g. joint ticketing) and marketing support to generate demand.

6.10 Summary

The indications are that the new formal and informal development opportunities offer the potential for substantial increases in visitor numbers. The new capital projects, particularly the Centre for Marine Excellence, Royal William Yard and the Naval Base Visitor Centre/Flagship Project will generate new visitor activity and change the geographical pattern of visitor use of the city.

While the changes to attractions at the Barbican will be of an incremental nature, the scale of attraction development in Devonport will change the leisure landscape of the City and provide a focus to the west towards the Hamoaze. At the same time, usage of the Barbican as a point of embarkation will be strengthened. That the development is adjacent to the water and there are active plans to make use of water transport will build the case for a water transportation system. However many of the plans are currently at an early stage and will take some time to come to fruition.

The detailed review of the future tourism and recreation market in the study area has led to the identification of the following opportunities for new and enhanced services:

- ***The development of opportunities in the Tamar Valley.*** These would benefit from immediate attention, with latent demand realised through a programme of marketing, further ticket and service co-ordination and facilities development. Round trip ticketing arrangements in the Tamar Valley would capitalise on walking opportunities. While there are opportunities to extend the activity along the Cotehele-Calstock axis, there are also opportunities to further extend the services between Calstock and Plymouth, offering the potential to integrate with the Tamar Valley Line rail services
- ***An enhanced service from the Barbican to the Upper Tamar.*** Short term, dependent upon demand.
- ***An improved link from the Barbican to Mount Edgecumbe.*** This is currently constrained by the limited berthing facilities at Cremyll. As plans to develop the landing facilities at Cremyll are in hand, this is a short to medium term project.
- ***Links from the Barbican to Millbay, Royal William Yard, the Devonport Flagship Project and the Naval Base Visitors Centre.*** This is a medium to long term prospect dependent upon the progress made on the development of the various visitor attractions.
- ***Services from and to a regenerated Hoe Foreshore.*** A medium to long term initiative dependent upon the regeneration of the Hoe foreshore.
- ***Services from the proposed Centre of Marine Excellence at Coxside to various locations in the Sound and Tamar Estuary.*** Details of the proposals are limited at

present. There is the potential danger that the services could operate in competition with services from the Barbican adversely affecting the viability of the latter.

- ***An occasional service linking Antony, Mount Edgecumbe and Cothele.***

An incremental way to develop a water transport service towards the Hamoaze and the west of the Sound would be to provide a hail and ride facility through the existing cruise boat services. The establishment of a federation of operators to set up routes, prices and times would provide an inclusive way to facilitate this sort of arrangement.

While high profile new attractions in Plymouth will serve to 'anchor' a water transportation service, it is likely that few visitors will want to make multiple attraction visits in any one day. Therefore the pricing and schedules of any future service will need to encompass the need to connect with attractions as well as the service being an attractive experience in its own right and also visiting locations with informal recreation opportunities – walks, shopping, catering etc.

The study has identified several services that appear to have future potential. However, the development of water transport in Plymouth Sound and Estuaries as an attraction in its own right is seen as an issue of overriding importance. One of the study areas greatest assets is its water frontage and it is strongly believed that many visitors to the area will expect to have the opportunity to explore the area by boat. If greater numbers of visitors can be attracted onto the water, then the viability of a range of services will be enhanced. The quality of the landing facilities, the vessels, the availability of a range of routes and the quality of the marketing effort will all be important factors. They are discussed in the following sections of the report.

The consultation exercise revealed that there is widespread interest from the tourism sector for the wider use of joint ticketing. A wider joint ticketing initiative could assist in encouraging visitors to use water transport services.

Closer links between cruise ship operators and water transport tour operators will be the most effective way of tapping into the cruise passenger market.

There is already a substantial events programme orientated towards the waterfront.

1. **7.0 PARK AND SAIL**
2. **7.1 Introduction**

The Barbican is currently the primary point of embarkation for visitors using water transport services. Visitors arrive in the Barbican by coach on organised tours or independently. The majority of independent visitors will arrive by car having parked in one of the city centre car parks.

The introduction of Park and Sail at a location outside the city centre would allow visitors to travel to the city centre by boat and water transport tours to start at an accessible location with coach drop off and parking facilities. Easier access to water transport services could enhance its attractiveness to visitors and thereby increase demand. The benefits for the City would include a reduction in demand for city centre car parking and coach facilities.

The previous Water Transportation Study concluded that the contribution that Park and Sail could play in generating demand should not be underestimated and to delay its development risked losing on which to provide parking. In the intervening period no sites have been safeguarded for Park and Sail use and the opportunities that remain are now limited.

Park and Sail is primarily seen as a service for visitors and seasonal operation may therefore be appropriate. The mode changes and travel times are unlikely to make it attractive for commuters.

7.2 Appraisal of Potential Sites

Only two sites, one on the Embankment and one on Breakwater Road, appear to have potential as Park and Sail locations.

The Embankment/Laira

The Blagdon Boatyard area, between Embankment Road and the River Plym has the potential to accommodate a sizeable car park for Park and Sail. It is a valuable 'prime location' that has been the subject of earlier planning applications and another has been recently lodged. In the Local Plan (1995-2011) First Deposit the area is subject to Policy 3 stating that planning permission will be granted for marine uses only falling within Use Classes B1, B2 and B8 or for other marine sector uses which directly support development of the marine sector. The current planning application includes proposals for a three storey hotel with a fitness centre, a restaurant and more than 90 flats.

There is concern over the amount of dredging that may be required to ensure access for a ferry at all tides and the difficulty in disposing the material. At low tides the existing channel effectively dries out. At high tides the headroom under Laira Bridge is restricted to 4.9m. hence a vessel may have to be purpose built. It would not be readily accessible by the local population, being remote and on the far side of the dual carriageway into the City, and hence of little value for non-leisure trips.

However, the Blagdon's Boatyard site is ideally located for coach and non-local car borne visitors to be conveyed onwards to the various waterfront attractions and indeed the City Centre. As a Park and Sail site it would conform to the designation in the Local Plan and be a less damaging and controversial use of the area. The site could also potentially be used as a bus based Park & Ride site on a regular or major event basis. A new junction would be required onto Embankment Road and this could incorporate pedestrian crossing facilities, which are badly needed in this area. At this location highway signing would be easy and effective and vehicles would be kept out of the City Centre and Barbican. During winter months when a Park and Sail facility would not be cost effective, the site could have an alternative use as a boat storage area.



Laira Road and Rail Bridges

Without details of the shape of the site that could be made available as a Park and Sail site only a very approximate estimate of the capacity can be provided. Additionally the degree of vehicle/pedestrian separation and soft landscaping provided will affect capacity. The following should therefore be viewed as a likely minimum requirement:

Special Events Park & Ride bus facility 1,575 sq. m.

Coach parking 135 sq. m per coach.

Car parking 25 sq. m per car.

For example, a 20 space coach park and a 200 space car park would occupy:

Special Events Park & Ride bus facility 1,575 sq. m 20 space Coach Park 2,700 sq.

m. 200 space Car Park 4,600 sq. m Total space requirement 8,875 sq. m. i.e. 2.2

acres

The Blagdon's site provides of the order of 8,600 sq. m.

The problems of low tide access and clearance under the Laira Bridge could be resolved by the creation of a landing stage on the south side of the Laira Bridge. Two possible arrangements for access from the Park and Sail site to a landing stage on the south side of the bridge have been identified.

A railway line runs past the south end of the site through to Cattedown. Access to it would be across a cycle track. The rail line is very lightly used for occasional bulk fuel movements. The potential exists, and perhaps should not be lost, to run a connecting train service between Blagdons Boatyard and a pontoon at Cattedown. Work has taken place on Cattedown Wharves and there is a gap between its northern extent and existing businesses where access to the waterside could be obtained. At this location there appears to be room for a small siding. When water access via water to Blagdons is denied, through low or high tide, or indeed at all times, the connecting rail link could be brought into use. For security purposes in this commercial area it would seem sensible to have a building that would house the rail vehicle overnight. The complexity of operating a rail link and the need to change mode are significant disadvantages with this option. Alternatively, a road-train could run along the existing riverside path and then along a new branch off this path and through the archway under Laira Bridge closest to the river. This archway is currently closed and used for boat storage. This alternative is considered to be the most viable.



Cattedown Wharves

One of the existing pleasure boat operators has suggested that pre-booked leisure cruises could start from Laira/Cattedown as an alternative to the Barbican where coach access is more restricted. Passengers would be dropped off at a coach parking area adjacent to the Park & Sail site and transferred to the landing stage, just south of Laira Bridge, by road train. Unless they were exclusive charters they could also call in at the Barbican to 'top up'. The Mount Batten Water Taxi, or indeed any other boat operator, could provide a linking service to the Barbican for other visitors.

Breakwater Road

The Breakwater Road area was originally investigated as a potential Park and Ride or Park and Sail site, particularly for commuters. It is no longer in any forward plan as it was considered to be too difficult to access and too close to the city centre. However, as yet no alternative site to the east of the Plym has been identified and it is suggested that the City Council may wish to re-consider this area, if only as a Park & Sail site aimed at visitors should the Embankment/Laira site prove unviable.

There appear to be two possibilities. The first is to use the redundant Pomphlett Jetty, suitably modified, together with the parking areas associated with that area. The advantage would be that most of the infrastructure exists. Alternatively, what appears to be a redundant concrete reservoir at the very southwestern corner of the Breakwater Works site could be used for parking. It extends to approximately 8,000 square metres. The corner of this lies approximately 35m. from the waterfront, through the Oreston Dinghy Park. A new pontoon at this location would have a dual-use in serving the local Oreston residents.

7.3 Summary

Of the two sites considered, the Embankment / Laira site appears to have most potential. The current urban design and transportation study of the Eastern Gateway to Plymouth will provide an opportunity for this site to be considered in a wider context.

From a water transport perspective, the creation of a park and sail site could be one of the most effective ways of increasing use by visitors.

The concept of providing an alternative location for coach drop off facilities is supported in principle by one of the harbour cruise operators.

1. **8.0 PHYSICAL IMPROVEMENTS**
2. **8.1 Landing Facilities - Design Parameters**

The configuration and design of landing facilities will by necessity vary to suit local conditions such as location (exposed coastal or sheltered estuarial waters), tidal range, nature of the foreshore (beach, vertical seawall etc.) and the type of vessel likely to use the facility.

However, in order to achieve the long-term objective of creating an integrated water transport system within the study area there needs to be an aspiration to meet minimum prescribed standards at all locations. The Employer's Requirements for the Mount Batten Landing Stage were based on research of facilities in the UK and a review of vessels operating in the Sound at the time and those likely to be introduced in the future. The intention was to set a new standard for such facilities in Plymouth Sound and Estuaries.

Lower Pier, Millbrook Lake- Whilst passengers in the 1890's might have been prepared to walk the plank, such precarious activities are no longer acceptable.

Ideally therefore, new facilities should have similar design parameters to those adopted for the landing stage at Mount Batten i.e.:

- . • Full disabled access at all states of the tide (limiting gradient of 1:12 on the access walkway and pontoon).
- . • A varying freeboard along the berthing edge of the pontoon suitable for a wide range of vessels.
- . • Sufficient depth of water at Lowest Astronomic tide to permit access by ferry vessels working in the Sound (approximately 1.5m).



Mount Batten Landing Stage

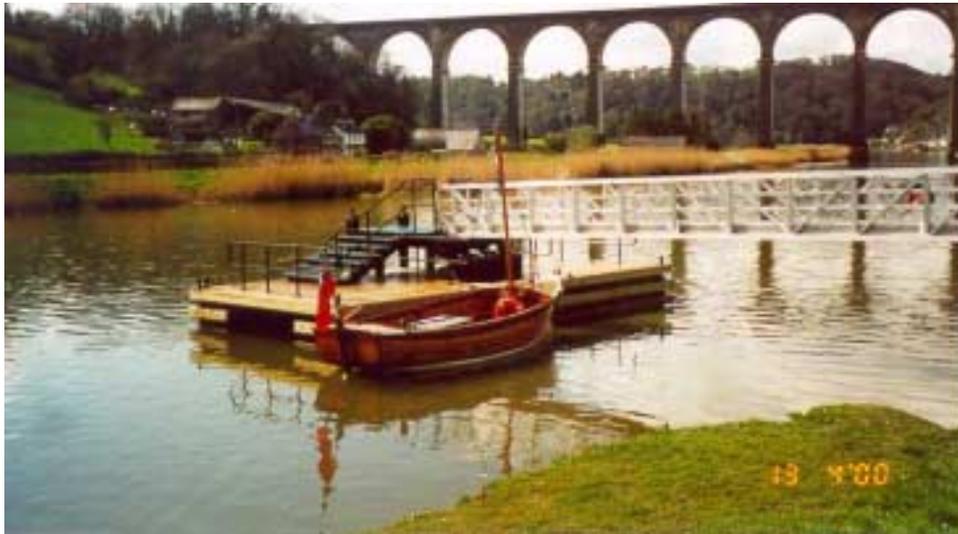
The requirement for provision to be made for disabled passengers has a significant bearing on the design of facilities given the tidal range in the study area. To meet the limiting gradient long walkways in conjunction with ramps on the pontoon area required which add to the overall cost.

	Plymouth to Cargreen	Calstock
Mean Spring Tide	0.8m-5.5m	0.4m-4.6m
Mean Neap Tide	2.2m-4.4m	1.4m-3.5m

Construction of a facility similar to the landing stage at Mount Batten would be likely to cost in the region of £650,000. It has to be considered unlikely therefore that the local authorities will be funding a network of these but will rely on their introduction in association with developments. To this cost will be added the cost of purchase or lease of the land above and below water occupied by the structure and its landside facilities.

In some circumstances the provision of a facility with full disabled access may not be practicable due to space constraints or an historical setting for example or, given the significant cost of such a facility, not economically viable because there may only be limited demand for services. In this case it may be appropriate to provide a facility with full disabled to serve a section of the waterfront, with the limiting gradient specification relaxed for other landing facilities in the vicinity allowing the use of a smaller pontoon and shorter walkway. This approach would need to be considered with the City Council Access Officer in the context of the Disability Discrimination Act. Formal dispensation may need to be obtained.

A further alternative that could be cost effective would be the use of 'landing craft' style vessels with hydraulically operated bow doors, similar to the vessels operated on the Padstow to Rock ferry service. These can operate from sloping slipways with a degree of accessibility for disabled passengers. Such an arrangement is not considered appropriate for use throughout the Sound and Estuaries but could be suitable for specific services, for example on the Upper Tamar.



The Landing Stage at Calstock

Within sheltered estuarial waters, smaller facilities, such as the one at Calstock, would be appropriate. This facility, which cost less than £100,000, allows disabled access at times when the larger ferries suitable for carrying disabled passengers can berth.

In terms of shore facilities, landing stages should ideally be provided with enclosed / covered waiting areas and public toilets nearby. The City Council has commenced the process of providing 'real time' passenger information at bus shelters within the Plymouth Travel to Work Area. Initially the system will be introduced on the low-floor bus routes, primarily along the northern corridor. As more low-floor buses are commissioned the area covered can expand (assuming the finance is available) and would provide a useful service at bus/ferry interchange shelters. It should not be forgotten that there will be an on-going maintenance liability which the local authorities may have difficulty in meeting given their existing commitments for the multitude of public access points. Therefore the developers should be obliged to deposit commuted funds to meet this liability.

8.2 Landing Facilities – Specific Improvements

The preceding sections of the report have identified potential improvements to existing services and new services that could be viable in the future. In order for the demand for services to be realised a number of factors will need to be addressed including improvements to landing facilities. The improvements necessary at locations where the potential for new and enhanced services has been identified are described. Where all new facilities are required these should be designed in accordance with the parameters defined above. The costs of new facilities are difficult to determine at this stage as design solutions are not yet developed. However, the costs quoted in the preceding section for the recently completed facilities can be used as a guide.

Millbay

A landing facility should have a close interchange with the bus service and this suggests it should be close to Millbay Road. The final location will need to be determined in the context of the development plan for the area.

The potential exists for a car/coach pleasure cruise interchange at Millbay Docks. However it is assumed that the development value and Local Plan designation of the site would rule out a major provision of parking.

Stonehouse

A replacement for Admirals Hard is required because the existing slipway is unsatisfactory; it is unsafe in darkness, unpleasant to use and has insufficient height at high tide. In addition, if the aspirations of Mount Edgecumbe Country Park are to be realised there would be a facility with disabled access at Cremyll that would need to be matched by a similar facility at Stonehouse.

There are a number of possible alternative locations between Admirals Hard and Royal William Square where a pontoon could be provided with access to Cremyll Street. A pontoon at these locations could serve both the Cremyll Ferry and future services bringing visitors to Royal William Yard.

A suitable location would appear to be in front of the west or south facing seawalls adjacent to the Strand Street Overflow Car Park. This site would be close to the existing landing point, close to the car park and bus route and within a short walking distance of Royal William Yard. The project would need to include dredging to allow vessel access at all states of the tide and adjustments to the boat mooring arrangements in Stonehouse Pool. Consent would be required for the dredging work. As the Tamar Estuary is designated as a Special Area of Conservation under The Habitats Directive, consent for dredging may not be forthcoming. Early consultation with the Marine Consents Unit and the Environment Agency would be advisable to gauge their views in advance of the preparation of design solutions. The removal of the existing Admirals Hard Slipway and the reinstatement of the bed may be an acceptable compensation measure.

Royal William Yard

If a new landing facility is to be provided at Royal William Yard then the most suitable location would appear to be inside the harbour basin although this would mean that the Swing Bridge would need to be kept in an open position. The installation of a facility outside the basin would have a significant visual impact on the listed structures. The connection between the walkway and the harbour wall would need to be designed to minimise disruption to the wall structure and to allow removal (in the long term) in order to satisfy English Heritage. Clearly close coordination with English Heritage would be required during planning and design.

Devonport

A pragmatic approach to the provision of landing facilities on the Plymouth side of the Hamoaze would be to invest in a fully accessible facility at Stonehouse and upgraded facilities at North Corner and Mutton Cove, albeit with some limitations on access by the disabled. The facility at Stonehouse could be designed with vehicular access and disabled parking close by.

The present North Corner landing stage is not fully accessible to the disabled and would require significant investment to make it so. It is unlikely that the landing stage would attract sufficient use to justify the investment required.

The existing facility at Mutton Cove consists of steps on the side of the harbour. Careful design will be required to develop a new floating pontoon and walkway facility at this location, which is both accessible and adequately protected from exposure to the elements. A landing stage in front of the existing promontory would be exposed to a long fetch to the southwest and would need to be of robust design and construction. Berthing could also be difficult in the fast tidal stream. On the other hand, space at the entrance and inside Mutton Cove is restricted and the bed dries out at low tide. The construction of a small pontoon with a short walkway close to the entrance to the Cove may represent the most appropriate solution in keeping with the character of the area. This solution would only be viable if the approach to the provision of disabled outlined above is accepted.

The plans for the Naval Base Visitors Centre include the provision of a pontoon for access by waterborne visitors. Details for the facility have not yet been developed.

Upper Tamar

For some time to come it would seem that additional services in the Upper Tamar will be run on similar lines to the Tamar Passenger Ferry with small traditional ferry boats and simple landing facilities, which serve the need and add to the enjoyment of the experience.

The construction of new landing facilities on similar lines to the facility at Calstock, would allow passengers on the Barbican to Calstock including disabled passengers, to disembark. Such a facility would be appropriate at Cotehele, and possibly at other locations in the future. In the meantime, improvements at other locations in the Upper Tamar should be targeted at enhancing access for and the safe use of small ferry boats.

The alternative use of shallow draft 'landing craft' style vessels, which can pick up and drop off passengers from slipways, could open up improved accessibility to all members of the public at a large number of landing points. The opportunities for the use of this type of vessel should be explored with potential service operators.

Saltash

It is understood that the newly provided pontoon, north of the Tamar Bridge, has not been designed to accommodate the larger passenger ferries that currently operate in the Sound (the facility was design primarily for yachts and pleasure boats). Upgrading may therefore be required if a service is inaugurated using larger passenger ferries. There is a public car park close to the new facility.

The old pier, south of the Tamar Bridge, is being refurbished in association with the new (2003) service to be provided by Plymouth Boat Cruises (PBC) from Phoenix Wharf. Dredging as necessary will be carried out. PBC envisage the possibility of acquiring a new vessel having front ramps suitable for the disabled and being able to use the old chain ferry slipway rather than the pier. The provision of a taxi rank is being progressed to create a transport link to the new ferry service.

Cremyll

A rise and fall pontoon is required to provide a facility accessible to the disabled. The sea wall either side of the jetty regularly suffers damage through inundation/undermining in exceptional weather conditions. The least environmentally intrusive area for a pontoon would be between the jetty and Mashford's Boatyard. Mount Edgecumbe Country Park has embarked on a study to identify a package of measures to improve accessibility and attractiveness. In general terms this will include a revision to landing arrangements and this study recommends that a fully accessible pontoon is provided complying with the defined design criteria. Capacity for more than one vessel to berth at a time would allow flexibility for the possible future introduction of links to Millbay, Mutton Cove, Royal William Yard and the Barbican.

The Hoe

The current landing arrangements are inadequate. While the proposed Phoenix Wharf facility is close by it is 'round the corner' and a new landing facility along the Hoe foreshore would be desirable for a linked water transport service for visitors. The earlier existence of the Pier suggests that such a pontoon would be viable. It would have to be sympathetically designed in order to complement and not compromise the outstanding setting of the area. This study recommends that such a facility should be considered.

In the current financial climate it is unrealistic to assume that the City Council alone would be able to provide funding. Objective 2 measure 3.3 '*Investing in the Tourism Infrastructure of Coastal Towns, Resorts and City Areas*' is heavily oversubscribed and closed for bids at this time (February 2003). There is likely to be a call for expressions of interest within the next few months. However the indications are that a landing facility may not be considered a high priority unless it can be shown to give sufficient added value to the programme area, to bring in extra visitors and to address seasonality.

Drakes Island

The Local Plan calls for a water transport link and the provision of landing facilities. Clearly both would be necessary for the development of this important heritage site.

Hooe Lake

The development brief in the Local Plan requires the provision of a new rise and fall pontoon in association with residential development. Dredging would be required for vessels to gain access to a landing facility close to Hooe Lake Point.

Oreston

It would appear feasible to provide a pontoon with access from the Oreston Waterfront. The most suitable location would appear to be at the northern end of the Waterfront close to the Plym Yacht Club. Some access dredging would be required together with adjustment to the small craft moorings.

This proposal would not relate to any development proposal and so would require Local Authority and / or grant funding. Were Park and Sail to be introduced at Breakwater Road then this service could make use of the same facility.

The Barbican

Plymouth City Council has prepared plans for a new ferry landing stage at Phoenix Wharf and implementation of the scheme is awaiting the completion of the funding arrangements. The scheme would provide a new pontoon, of similar configuration to the existing pontoon at Mount Batten, positioned 26 metres to the east of the end of Phoenix Wharf. The new pontoon would be linked to the existing wharf by an access bridge. Parts of the existing walkways and steps would be demolished to accommodate the new bridge.

The facility has been designed to receive passengers from cruise ships moored in the Sound. This would provide an alternative destination to Millbay and a more direct route for visitors wishing to see the Mayflower Steps and the Barbican. The proposed facility would also provide access to vessels for the disabled at all states of the tide, would improve overall safety for all passengers and would enhance the visitor experience for passengers.

However, whilst the proposed scheme at Phoenix Wharf has a number of merits, the new facility would not increase overall capacity and would not provide sufficient berthing space for all existing operators. Hence, the Mayflower Steps and water taxi landing stage would continue to be used for passenger boat operations. The potential for future extension of the new facility to provide additional berths would be constrained by the need to maintain access to the public slipways.

A more visionary approach would provide capacity for all current operators and services together with cruise liner tenders in the short term with designed-in potential for extension of the berthing area as the demand for new services develops. This approach would allow the Barbican to develop as primary 'hub' for a water transport network in the Sound. Use of the Mayflower Steps could be discontinued and the water taxi landing stage could be decommissioned. The on-going maintenance liability of Phoenix Wharf could be reduced by the removal of the landing stages and steps. This would also improve its appearance.

The area in front of Commercial Wharf would appear most appropriate for this type of facility. Pontoons, installed in phases to suit demand, could be positioned in a north-south alignment to provide a number of berths without encroaching into the exclusion zone around the entrance to Sutton Harbour and without obstructing access to the public slipway. The berths could be served by a single access bridge from the shore. The development on the water could be integrated with commercial development on the shore to provide ticket offices, visitor information, covered waiting areas and retail / refreshment outlets. In summary, a new vision for a water transport 'hub' in the Barbican could significantly raise the profile of water transport in Plymouth Sound and the Estuaries and with it demand and viability.

The construction of the facility described above would displace the existing moorings in front of Commercial Wharf. Appropriate alternative facilities would need to be secured.

The City Council tried unsuccessfully to increase the size of the Lambhay Hill car park by adding further decks to improve the availability of car parking in the Barbican. This failed principally through objections from English Heritage due to its visual impact on The Citadel behind it. Since that time The Citadel itself has undergone a substantial enlargement, however it would seem unlikely that a new proposal to extend the car park would succeed. The Elphinstone car park / dinghy park has been taken over by the Sutton Harbour Company for re-development. It is a prime site and better suited to other uses.

There is no obvious solution to a direct car/coach – pleasure cruise interchange in the Barbican / Hoe area. The potential exists to convert the 21 on-street car parking on Madeira Road, between the Barbican and Lambhay Hill, to coach parking. This would assist the coaches but further disadvantage the car visitors. Such a change would require extensive consultation with the City Council Planning Department who previously insisted that car parking on this length took place on the 'land' side rather than the 'water' side of the road to minimise its visual impact from the east. In addition careful consultation would be required with the Barbican Traders Association who are concerned about the level of car parking in the area.

Sutton Harbour

The limited variation in water level within Sutton Harbour would allow the use of simple landing facilities for a water taxi service operating inside the lock gates.

8.3 Vessel Design

Existing Craft

The majority of vessels currently providing water transport services within the study area are relatively old. Several vessels on the Tamar are over 40 years old. Their replacements should be designed to integrate with future needs and services.

The view is held that the pleasure cruise market would benefit as an attraction in its own right if it presented the customer either with smartly presented new vessels or clearly 'period' vessels. Without significant investment it may be difficult for current proprietors to replace their ageing fleets to meet these requirements. This strengthens the finding that through better marketing of their cruises they could capitalise on the potential that exists and hence be better placed to afford new craft.

Design Parameters

New vessels should ideally comply with the following design parameters, as appropriate for the particular service(s) on which they will be used:

- . • Have covered accommodation with the option to remain on deck.
- . • Offer a comfortable environment.
- . • Have ease of access at all states of the tide for persons of all levels of mobility from existing and purpose built landing stages.
- . • Have minimum boarding/alighting times.
- . • Have sufficient capacity.
- . • Have minimum running costs.
- . • Be easy to maintain.
- . • Be usable in all weathers.
- . • Be manoeuvrable.
- . • Have low draft.
- . • Be pollution free.
- . • Be sustainably constructed.
- . • Have storage for pedal cycles.
- . • Be equipped with navigation equipment to remain operational in fog.

Depending on the length of journey the vessel could be provided with toilets and refreshment facilities.

It has been suggested that with an automatic docking system (purpose-designed craft and landing stages) the vessel could be operated by one person. This would have a significant effect on operating costs, however a satisfactory means of ticket issue and validation would be required.

The technology and design is available to produce a low wash vessel to minimise the effects of wake at speed. However, The Queens Harbour Master remains of the view that on the grounds of safety (i.e. reducing the risk of collision) the current speed limits (10 knots in the majority of the study area) are appropriate. Hence, fast vessels such as the vessel recently introduced in the Scilly Isles, will not be beneficial in the Sound and Estuaries.

The landing craft style of vessel, such as the vessel used on the Padstow to Rock Ferry Service, can land at conventional slipways and offer accessibility for disabled passengers. The vessel is unlikely to be suitable for use in the Sound and Hamoaze due to the exposed conditions and the length of trip. The vessel may be appropriate in the more sheltered Upper Reaches of the Tamar where there are a number of slipways.

Vessels are expensive to obtain and maintain. To provide a reliable service, backup should always be available to cover unexpected breakdown and planned refits. Alternatively the vessels themselves should have dual operating systems and easily replaced components. The would suggest that the current single mid-engine propulsion unit should be replaced by twin outboard propulsion units, with the craft being able to operate on one engine and the engines chosen for ease of repair or replacement. To minimise pollution outboard engines should be 4-stroke and not 2-stroke.

Water jet propulsion should be considered, such as utilised in the 'River Runners' made in Darwin by NQA. Examples of these are in use on the Thames, Belfast Lough and in Amsterdam.

The most expensive scenario would be for a number of ferry companies to be running on different routes using existing style propulsion system craft. Unless the companies unite in a fairly loose arrangement to fund a standby craft usable by all they will all need a backup vessel.

A single ferry company running all routes would require a minimum number of backup craft and the company could more readily co-ordinate refit dates etc.

There are boatyards in the local area capable of constructing vessels suitable for use in the Sound and its Estuaries. A company based in Cawsand is developing environmentally friendly craft, taking into consideration 'whole-life' costs as well as running costs and propulsion systems. At present their capacity is limited to 12 passengers.

Disabled Access

It is national and local policy to cater for the less mobile in society. Chapter 50 section 19 of the Disability Discrimination Act 1995 states:

.(1) It is unlawful for a provider of services to discriminate against a disabled person in refusing to provide, or deliberately not providing to the disabled person any service which he provides, or is prepared to provide to members of the public;

.(5) Except in such circumstances as may be prescribed, this section and section 20 and 21 do not apply toany service so far as it consists of the use of any means of transport.

This would indicate that whilst it may be policy to, and undoubtedly desirable to, procure and use a fully accessible vessel there is no legal requirement. An extension to the services in the Upper Tamar can therefore take place without the need to cater fully for disabled people, although the objective should be to make provision as far as is reasonably practical.

8.4 Environmental Impact

Plymouth Sound and its Estuaries constitute one of the finest extensive ria systems in Britain (a river valley that flooded due to rising sea level after the last great ice age). It is particularly significant in terms of marine wildlife due to its southerly location and diversity of habitats, which are extremely rich in flora and fauna.

In recognition of its significance, the area encompassing both the Tamar and Plym Estuaries has been designated Special Area of Conservation (SAC) under the Conservation (Natural Habitats etc.) Regulations 1994 (the "Habitats Regulations"). This is a European Designation assigned to the most valuable habitats in Europe. The Habitats Regulations therefore apply to any development in these areas.

In addition to the Habitats Regulations, the Environmental Impact Assessment Regulations will also apply to any development proposals.

For projects involving construction in the marine environment applications for consents/licenses under the Food and Environment Protection Act and the Coastal Protection Act will need to be made through the Marine Consents Unit (a joint unit set up by DEFRA and DLR to administer the application process). It is almost certain that an environmental impact assessment will be required for each project.

The Marine Consents Unit, through consultation with a wide range of statutory consultees, will assess the impact of the development proposals on the integrity of the SAC. If, following an appropriate assessment, it is deemed that there would be an adverse affect then consent cannot be given unless there is no less damaging alternative and an imperative reason of overriding public interest. Mitigation measures (which maintain the integrity of the site) and compensation measures (which address the residual impacts) can be proposed to offset the potential adverse impact so that consent can be secured.

In practice, great care will need to be taken in the design of new and improved facilities to avoid significant impact on the environment. In particular, the requirement for dredging or land reclamation will need to avoided where possible or compensation measures may need to be considered to address the residual impact on the SAC.

New vessels should ideally be designed and procured to be 'whole life' environmentally sustainable. Their propulsion systems should cause minimum pollution (including noise) and the detrimental effect of wash on the riverbanks should be avoided.

Any vessel used in a ferry mode should be capable of carrying pedal cycles at reasonable cost and the terminals of both ferry and leisure services should be provided with secure cycle parking facilities. Integrated links should also be provided with other modes of public transport.

1. **9.0 MARKETING INITIATIVES**
2. **9.1 Introduction**

The profile of tourism in Plymouth is significantly different to the surrounding districts and to many other parts of the South West. In terms of visitors staying in the City, there are more visits to friends and relatives, more business trips and more short breaks. Accordingly, the commercial accommodation stock is geared to these markets, with more serviced accommodation and less self-catering accommodation. While all population centres will generate trips to friends and relatives, the MoD personnel from all over the country stationed in Plymouth have an above-average propensity to generate such trips.

Plymouth fulfils a major role as a day visit destination, both for residents of the South West but also for visitors staying in holiday accommodation elsewhere in the South West, particularly South Hams, Torbay and Caradon. The profile of trips to these surrounding areas is markedly different to Plymouth, with a greater proportion of longer holidays and more use of self-catering accommodation, combined with fewer business and visits to friends and relatives. It is therefore likely that many of the potential users of a water transportation system for Plymouth will be from outside the City, and marketing any such service will have to consider the geographical issues and the profile of trips.

9.2 Current Marketing Activities

Plymouth

Plymouth Marketing Bureau markets the City, targeting five segments:

- . • Conference Organisers
- . • City Breaks
- . • Travel Trade
- . • Day Visitor
- . • Overseas Visitors

Between 60,000 to 80,000 guides are printed annually, with the overall quantity geared to available finance and distribution mechanisms. The City Break market is addressed through destination marketing in a variety of media plus co-operative work with a range of partners (e.g. South West Tourism, Great British Cities etc.). Overseas visitors are accessed via the Devon and Cornwall Overseas Marketing consortium. Plymouth Marketing Bureau also operates a website, providing motivational material as well as attractions, events and places to visit. Tourist Information Centres are located at the Barbican and at Marsh Mills. Although there is no current tourism strategy for Plymouth, the Tourism Development Group and the current Best Value exercise are tackling issues incrementally by:

- . • Identification and pursuit of core markets (see above)

- . • Work on niche markets (e.g. cruise ships, through Destination South West)
- . • Work in a joined up way to address the local day visitor market (currently outside the Plymouth Marketing Bureau remit)
- . • Increase the number and profile of events, and making better links between events with marketing

At a strategic marketing level, the drivers for growth in the long term are continued focus on the Barbican/Coxside (with the National Marine Aquarium phase 2), along with the planned developments at Royal William Yard and South Yard.

South Hams

The main vehicles for the marketing of South Hams are the South Hams Holiday Guide and the www.somewhere-special.co.uk website. Environmental and other sustainability issues feature strongly in the destination marketing, along with opportunities to undertake walking and cycling, linked to use of public transport and exploration of villages. South Hams District Council produce the 'Out and About in the South Hams' annual leaflet (c. 30,000 per annum), which provides guidance on visitor use of the area using boats, trains, bus, bikes and on foot, as well as motivations for doing so. Importantly, the information explains how the different transport systems work together. The District Draft Recreation and Access Strategy 2000-2005 sets out how the leaflet is reinforced by joint bus-ferry discounted tickets and wide spread access to information.

The round robin joint-ticketed trip through the South Devon Steam Railway, Red Cruisers Ferries and bus/coach companies demonstrates how private services can be networked to form an attractive visitor offer using different types of transport.

Caradon

The South East Cornwall Looe & Polperro Holiday Guide 2002 and Accommodation Register 2002 are used to market South East Cornwall to domestic visitors, and the district works through the Devon and Cornwall Overseas Marketing Consortium to attract visitors from overseas. The www.southeastcornwall.co.uk website is also used to provide visitor information and includes some information on the Tamar Valley and on walking and cycling opportunities in the district.

West Devon

The West Devon tourism strategy is focussed on developing sustainable tourism policies to preserve and improve the countryside and to reflect local heritage. Priorities include:

- . • Encouraging more short breaks through working with other Devon Districts
- . • Encouraging more business tourism through the Conference Devon partnership
- . • Working through the Devon and Cornwall Overseas Marketing Consortium to attract visitors from overseas

Tamar Valley

The Tamar Valley Tourism Association is developing a programme of marketing for the Tamar Valley, using PR work and a website, along with the development of a number of marketing co-operatives. The main markets identified for the Tamar Valley are adults on second holidays seeking walking, arts and craft, heritage, National Trust properties etc., although there is some interest by families. The day visit market from Plymouth is also identified as having more potential.

Other initiatives include a programme of events and local sourcing programmes. Provision of information is seen a priority in encouraging visitors to spend more time in the Tamar Valley e.g. packs of information on days out without the car are provided in holiday accommodation to persuade people to stay in the area. The river and the opportunities offered by the rail and river transportation are also seen as key to the Valley's offer to visitors.

The Tamar Valley railway line is marketed through the Days Out to the Tamar Valley and Dartmoor leaflet, which provides details on using water transport in conjunction with trains. It also forms one of the lines in the Great Scenic Railways leaflet.

Boat Operators

Tamar Cruising produce their own leaflets and have a web site on www.tamarcruising.co.uk.

Plymouth Boat Cruises have raised their production of leaflets from 35,000 in 2002 to 75,000 in 2003 in association with the new service between Plymouth and Saltash. Their web pages are accessed from the Westcountry Links site – www.westcountrylinks.co.uk/pbc and through the Tamar Valley Tourism site, www.tamarvalleytourism.co.uk.

Mount Batten Water Taxi has its own web site on www.mbwt.co.uk.

9.3 Future Marketing Initiatives

The indications are that the new formal and informal development opportunities will generate the potential for substantial increases in visitor numbers using water transport. For these numbers to be realised there will need to be some combination of:

- . • Increased waterfront usage by Plymouth residents
- . • More day trips by residents of surrounding districts
- . • Increased numbers of holiday short breaks to Plymouth
- . • A greater level of interest in the waterfront leisure opportunities by people taking trips to visit friends and relatives in Plymouth
- . • Greater interest in Plymouth by those staying on holiday in surrounding districts, particularly in the light of recent falls in the number of visitor nights in Torbay, which supplies a significant proportion of the day trips from holiday accommodation
- . • Improved seasonal spread of water transport usage

There will need to be particular policies and marketing efforts to generate these changes, by both the public and private sector across East Cornwall and South and West Devon. It is apparent that some of the changes are already underway (e.g. the Plymouth Marketing Bureau's attention to the day visits from the City). While there will be marketing initiatives necessary to exploit the opportunities presented by some of the future regeneration schemes (e.g. Royal William Yard etc.), there are a number of current opportunities such as:

- . • Promotion of short break packages combining accommodation, water transport, attractions etc.
- . • Promotion of round trip packages using water transport in conjunction with other non-car transport (bus/rail/cycle/walking). This would need to include properly integrated timetables
- . • Marketing activity orientated towards greater use of water transport by Plymouth residents. This will need to build the appeal of using Mount Edgecumbe, the Tamar Valley and, to a lesser extent, Mount Batten. In this context, water transportation is part of the attraction of the trip rather than merely the means of accessing locations around the Sound and estuaries. This will require action primarily by Plymouth City Council
- . • The opportunity to use the events programme (see earlier sections) to further build use of water transportation. This would require the active involvement of any federation of water transport operators as well as Plymouth City Council, working in partnership with any separate events organisers (such as the Royal Navy for Navy Days). As well as the programme in the Sound, the events programme in the Tamar Valley can be further developed
- . • Building use of the services to and around the Tamar Valley. This could include partnership working between Plymouth City Council, Caradon District Council, West Devon Borough Council, Wessex Trains, Tamar Valley AONB, Tamar Valley Tourist Association and the boat operators.
- . • Building the use of services to Mount Edgecumbe and to Mount Batten through more marketing.
- . • Co-ordinated information and marketing about existing water transportation/cruises. This would require co-operative working by the water transport operators. The consultation process has identified tourism operator enthusiasm for joint ticketing across attractions and transportation operators. The introduction of any such scheme would be facilitated by any federation of water transport operators, along with in kind support from organisations such as Plymouth Marketing Bureau to get the scheme off the ground, and some limited supporting budget for printing and promotion of the scheme. This sort of scheme could take the form of a 'visitor passport' that allows travel and entry to different attractions over a period of time
- . • Familiarisation trips for TIC staff, attraction operators and accommodation operators in the catchment area

Work undertaken elsewhere (e.g. South Hams) shows the importance of marketing visitor and leisure orientated transport in an integrated manner, tied in with reasons to make the trip. In fact, the South Hams District Council '*Out and About in the South Hams*' annual leaflet would be a good model for the Tamar Estuaries Area to adopt, particularly if some of the other elements such as the Plymouth Waterfront Walkway were included. Such a leaflet would cover all local authority areas surrounding the Estuaries and a partnership of these may share funding. In addition operators such as Wessex Trains may contribute, particularly if they felt that leaflets would be well targeted. An allowance of £6,000-£8,000 should cover about 50,000 A2 folded to A5 leaflets.

The web also offers potential and around £3,000-£5,000 would build an attractive stand-alone website. However there may be benefits from housing the site within one of the authority websites to ensure that it is maintained. This site should be linked to all other relevant websites.

9.4 Summary

There are a number of initiatives that can take place in the short term to increase use of water transportation in Plymouth Sound and estuaries.

The suggested methods would include PR work (particularly amongst Plymouth and surrounding district residents), briefing of TIC staff, attraction operators and accommodation providers (including familiarisation trips), development of Internet information and promotion with appropriate links, inclusion in existing visitor guides and publication of leaflets. Importantly, initiatives will need to consider public sector cross-border working in order to maintain a visitor market focus, and will in many cases require a co-ordinated response from the private sector.

The issue of marketing extends beyond the promotion of the water transport services. It should also look to use the opportunities provided by the attractiveness of water transportation to market the city and surrounding districts.

1. **10.0 FUNDING STREAMS, POTENTIAL PARTNERSHIPS, OUTCOMES AND RESPONSIBILITIES**

2. **10.1 Funding Streams**

The key potential funders for Plymouth water transportation initiatives include:

- . • Plymouth City Council
- . • South West of England Regional Development Agency
- . • Objective Two Programme
- . • Objective One Programme

Other potential funders include:

- . • Devon County Council
- . • Caradon District Council
- . • West Devon Borough Council
- . • Countryside Agency

Plymouth City Council has a strong interest in water transportation in the Sound and estuaries. There are opportunities for the City Council to provide in kind support through increased PR work and through a continued waterside emphasis of current events work. There are also opportunities for the City Council to provide in kind support through taking a lead role in encouraging the formation of a Federation of Water Transport Operators.

The South West of England Regional Development Agency (RDA) has categorised Plymouth as a priority city and is already committed to a number of major regeneration schemes around the waterfront. Discussions indicate that the RDA already recognises the value of a water transportation system in Plymouth and is supporting the development of the new Phoenix Wharf facilities (in partnership with Plymouth City Council and English Partnerships).

The RDA has also indicated that it may be able to extend support to other infrastructure development, such as facilities at the Hoe, provided that any such development is part of a comprehensive plan with links to the other schemes such as Millbay, the Barbican and Royal William Yard, and that the rest of the funding package can be assembled.

The key recommendations for the RDA are that explicit consideration and adequate funding are built into the waterfront regeneration schemes to allow the development of water transportation facilities. This will include consideration of enhanced public access along the waterfront, landing facilities, transport interchanges and inclusion of leisure elements in the regeneration schemes.

The Objective Two Programme Measures 3.3 (Investing in tourism infrastructure of coastal towns, resorts and city areas) and 3.4 (Promotion and development of the regional distinctiveness of the area) are relevant to water transportation in Plymouth.

Measure 3.3 aims to increase tourism expenditure in coastal towns, resorts and city areas through the provision of quality new and improved attractions, visitor facilities and related infrastructure. However, the measure is heavily oversubscribed and currently closed for bids. It is likely that there will be a call for expressions of interest to be assessed by the Priority Management Group and it is therefore recommended that consideration is given to which of the potential infrastructure developments should be put forward. Initial indications are that there would have to be a strong case made for the potential pontoon at the Hoe in order to address concerns about increasing peak season use and about not bringing additional visitors.

- Measure 3.4 aims to increase the competitiveness of tourism businesses, identify and target new markets to increase the number of both UK and overseas visitors to the South West Objective 2 area at a rate above the national average. However, this measure is even more oversubscribed and may not open up for bids this year. Should any opportunities open up under this measure, any bid would need to be targeted towards off-peak season activity.

There clearly needs to be a dialogue with Government Office in order to ensure that markers are put down for specific project proposals and that the priority management group for Objective 2 is aware of the potential.

The Objective One Programme Measures 2.4 (Strategic Regional Infrastructure) and 5.2 (Enhancing and Developing the Public Product) are relevant to water transportation in Cornwall.

- Measure 2.4 aims to remove infrastructure barriers that act as a constraint to the realisation of the full beneficial impact of projects and plans. This includes improvements to harbour and port facilities related to the needs of Cornish businesses.

- Measure 5.2 aims to maintain and increase the economic benefits derived from the coastal and inland heritage, the buildings and structures of historic value and the natural environment with emphasis on access for visitor and resident alike. Activities may include restoration of existing slips/access points/quays/piers/harbour walls of the smaller harbours and coves.

Projects spanning the two programme areas can seek funding from both.

The Countryside Agency operates the Rural Transport Partnership Grant and the smaller scale Parish Transport Grant schemes. The schemes support community-based transport initiatives which secure a long term improvement in rural people's access to jobs, services and social activities, and which enhance visitors' access to the countryside. A wide range of schemes, both motorised and non-motorised are eligible. Up to £250,000 can be applied for each eligible project. The opportunities under this programme should be explored for the rural parts of the study area.

Other sources of funding might include the Distributive Environmental Bodies (DEB's) administering Landfill Tax Credit funds. Different DEB's will have different priorities and criteria and there are a number of these bodies covering Devon and Cornwall,

The Local Transport Plans (LTP's), prepared by Cornwall County Council, Devon County Council and Plymouth City Council, set out policies and targets for sustainable integrated transport. The LTP process gives an indication of forward allocation of finance in fairly broad bands of expenditure and is shortly due for revision. It is considered that where a water transport facility is used, at least in part, by commuters or assists in managing demand, such as Park and Sail, a bid for assistance with funding within the LTP process would be appropriate.

10.2 Potential Partnerships

A Steering Group will be needed to ensure that the proposals are undertaken in a comprehensive manner. The Group must cover all the organisations with a relevant interest in the project. Organisations that could be included are:

- . • Plymouth City Council
- . • Plymouth Marketing Bureau
- . • SW RDA
- . • Water transport operators
- . • Maritime Plymouth
- . • Plymouth Chamber of Commerce
- . • Government Office South West
- . • Caradon District Council
- . • West Devon Borough Council
- . • South Hams District Council
- . • Tamar Valley Countryside Service
- . • Countryside Agency
- . • Devon and Cornwall Rail Partnership
- . • Wessex Trains
- . • Bus operators
- . • Tamar Valley Tourist Association
- . • Queen's Harbour Master
- . • Destination South West

Once individual projects start to come forward for implementation, they will become the responsibility of the owner / developer, funding organisations and water-transport operators.

The formation of a Federation of Water Transport Operators would provide a representative voice for the private sector that could work with, and be represented on, the Steering Group.

10.3 Employment and Training Opportunities

Employment

Current water transportation operators are:

- . • Tamar Cruising
- . • Plymouth Boat Cruises
- . • Cawsand Ferry
- . • Silverline
- . • Mount Batten Ferry
- . • Tamar Passenger Ferry
- . • Devon Belle II

Employment across these operators (assessed through interview and two estimates) is 54.5 Full Time Equivalent jobs (FTE's) in the summer, falling to 27.5 FTE's in the winter. This employment is spread across 13 boats (giving an average of four FTE's directly employed per vessel), although some operators have alternative boats rather than the ability to crew their whole fleet at one time within their current workforce. Note some employment will be support staff as well as crew.

The analysis earlier in the report indicates that there are significant short term opportunities and substantial longer term opportunities. Discussions indicate that the short term opportunities are likely to increase the utilisation of existing craft and bring forward plans to invest in new vessels. It is likely that the increased utilisation will add to employment and if the marketing initiatives discussed above are able to improve the seasonal spread of visitors, then a greater proportion of the employment will be year-round.

Short to medium term employment targets could include a 10% increase in peak season FTE's (another 5 FTE's, the equivalent to just over one more vessel in operation) and a 20% increase in off peak employment (11 FTE's, the equivalent to just under three more vessels in operation). It is considered that given the opportunities offered, these targets should be achievable with adequate marketing and other support.

Longer term employment targets could be substantially greater, although very difficult to assess at this stage.

In addition to the increased employment in the water transport operators themselves, there are likely substantial wider benefits. Discussion earlier in this report has highlighted the links between water transportation and the range of other leisure opportunities in the study area. Water transport will help to secure the viability of tourist attractions and other visitor-facing businesses through raising the profile of the waterfront and tangibly delivering customers. Even at an early stage, a firm stated public commitment to water transport can be used in attraction and other visitor facing facility business planning.

On a wider level, the presentation of water transport has the potential to be a key factor in the development of Plymouth and the surrounding districts as visitor destinations. If it is able to play such a role, then the employment supported will be very substantial.

Training

The key training issues will be across the following areas:

- . • Maritime competence/safety
- . • Customer care
- . • Business management

At a basic level it is critical that any services are operated to the highest safety standards, and that where possible these should look to likely future safety requirements as well as current obligations. In addition to any losses directly related to an incident, there are issues relating to impacts on the usage of the whole set of services. There is a clear need to ensure that there is adequate provision of training for operators in this respect, and that lack of such expertise does not constrain growth in the sector.

Visitors have increasing expectations about the quality of service in their accommodation and attractions and will apply those standards to water transportation services. In addition to the warmth of welcome on the vessel itself, customer care will include pre-visit standards of information, bookability etc. as well as any aftercare and the way that the waterborne experience relates to other parts of their trip (e.g. parking, catering etc.). It is recommended that the water transport operators are part of the wider tourist industry network in this respect, with participation in courses such as Welcome Host and, in conjunction with other land-based tourism operators, development of specific training courses to meet other needs. As part of the training programme to improve the services provided to visitors, consideration should be given on training staff about the history and significance of the area and its attractions. Participation in such courses should be actively used by water transport operators to demonstrate their visitor focus.

In the same way that other small businesses will typically benefit from business advice, it is recommended that water transport operators are actively targeted for business management advice. This should improve viability of services for a given level of demand, which could be crucial during the early development stage of services. Effective forms of support include schemes such as business mentors and peer group networks (to include other locations as well as Plymouth Sound and estuaries).

There is a clear role for a coordinated approach by a partnership of agencies to include Enterprise Plymouth and formal education providers in the City. Other parts of the tourism industry have identified confusion about the range and benefits of training courses, as well as the issues that small businesses face in the time to send key personnel on training courses, and it is likely that similar issues will apply to water transport operators.

10.4 Maintenance Responsibilities and Arrangements for Landing Fees

The responsibility for maintenance of landing facilities should rest with the Local authority in the case of public landing facilities and private owners in the case of private landing facilities.

A proportion of the landing fees paid by boat operators should be aside to cover routine maintenance and future repair and upgrade. This has not happened in the past and as a consequence a significant un-funded backlog of repair work has developed.

10.5 Summary

Plymouth is a priority area for regeneration, and therefore there are some funding opportunities available. However funding issues include:

- . • Over-subscription for some of the funding opportunities
- . • A clear need to present an integrated approach across a range of projects

Continued development of the water transportation opportunities in the study area will require a steering group drawn from a cross section of agencies. This group will identify opportunities and work with the key parties in order to ensure that projects are viable, meet funders' requirements and fit within the wider regeneration of the study area.

The development of water transportation offers opportunities to increase employment in the sector directly, as well as substantial wider potential employment impacts.

The study has identified training opportunities across maritime competence/safety, customer care and business management.

There is a need to ensure that revenue from use of water transport facilities is re-invested.

1. **11.0 CONCLUSIONS AND RECOMMENDATIONS**
2. **11.1 Conclusions**

The waterfront is Plymouth's USP. The City has many problems – deprivation, unemployment, areas of dereliction – but it is located in one of the most spectacular settings in the country. There are many plans to regenerate the City and in particular the waterfront areas, but in order to make these plans happen, Plymouth's profile needs to be raised and investors, occupiers, residents need to be convinced that Plymouth can be transformed. An attractive, good quality water-transport system would provide a significant contribution to that transformation, by changing the emphasis of the City towards the waterfront and making much greater use of areas of the City with a high international recognition factor such as the Hoe. It would also provide much needed sustainable access solutions to major regeneration sites such as the Royal William Yard.

It is difficult to provide accurate predictions about the future levels of demand, when so much of the waterfront area is still the subject of studies to determine their future. What is clear is that Plymouth needs to make much more of its waterfront and promote the waterfront and the qualities of the City in order to assist in the implementation of its ambitious regeneration proposals.

The study has found that there is potential for increased demand for water transport services in the study as a consequence of:

- . • The redevelopment of significant waterfront sites in Plymouth to create new or enlarged residential communities. Water transport would provide access to other parts of the Sound and Estuaries, predominantly for formal and informal recreation. The potential for access to employment will be limited.
- . • The creation of new formal visitor attractions on sites on or accessible from the waterfront. A proportion of their visitors could be encouraged to travel by water transport.
- . • Tourism trends which suggest an increase in the number of visitors to the Region.
- . • Widespread support for exploring non-car transport from national and local planning policies and guidance.
- . • A wider appreciation generally of the quality of life and importance of leisure time and an understanding and interest in the natural and historical environment.

Many of the more significant development projects are in their infancy and will take some time to come to fruition. For this reason, the development of a wider integrated water transport system should be seen as a medium to long term objective. However, in order to achieve this objective, it is important that plans are established now and that short term projects are progressed as part of a longer term strategy.

The review of the implications of the planned waterfront development and the potential demand from existing communities has led to the conclusion that the following services could be viable for residents travelling to other parts of the study area:

- **A service linking Turnchapel, Hooe and Oreston with the Barbican.** The introduction regular service from these locations would open up the opportunity to use water transport to a number of walking and cycling passengers.
- **A service from Millbay to locations in the Western Sound and Hamoaze.** There may be sufficient future demand for a seasonal/weekend service for residents. In the reverse direction Millbay would be a point of arrival for travel to the City Centre.
- **A service from Mutton Cove and North Corner to Cremyll.** Again there may be sufficient demand for a seasonal/weekend service for residents.
- **A service on a circular route serving Millbay, Cremyll, Royal William Yard and Mutton Cove** as an alternative to the previous two services.

As all of the above proposals are dependent upon the progress made on a number of development projects they constitute medium (5 to 10 years) or long term (>10 years) projects. However, there is an urgent need to plan for water-front infrastructure as early as possible as accessibility by water is likely to be a key tool in marketing and promoting the development opportunities on waterfront sites. The project at Mutton Cove could be brought forward as there is already an established community in the area.

The in depth appraisal of the tourism and recreation market including assessment of the impact of planned new attractions has led to the conclusion that the following services could be viable:

- **The development of opportunities in the Tamar Valley.** These would benefit from immediate attention, with latent demand realised through a programme of marketing, further ticket and service co- ordination, facilities development and packaging of travel and activities. Round-robin ticketing arrangements in the Tamar Valley would capitalise on walking opportunities.
- **An enhanced service from the Barbican to the Upper Tamar.** Short term, dependent upon demand.
- **An improved link from the Barbican to Mount Edgecumbe.** This is currently constrained by the limited berthing facilities at Cremyll. As plans to develop the landing facilities at Cremyll are in hand, this is a short to medium term project.
- **Links from the Barbican to Millbay, Royal William Yard, the Devonport Flagship Project and the Naval Base Visitors Centre.** This is a medium to long term prospect dependent upon the progress made on the development of the various visitor attractions.
- **Services from and to a regenerated Hoe Foreshore.** A medium to long term initiative dependent upon the regeneration of the Hoe foreshore.
- **Services from the proposed Centre of Marine Excellence at Coxside to various locations in the Sound and Tamar Estuary.** Details of the proposals are limited at present. There is the potential danger that the services could operate in competition with services from the Barbican adversely affecting the viability of the latter.
- **An occasional service linking Antony, Mount Edgecumbe and Cothele.**

Unfortunately, many of the potential new and enhanced services identified above will be most viable at weekends and during the summer season, particularly in the short term before services become well established. From an operational point of view this problematic due to the limited availability of vessels and the inefficiencies associated with crewing a vessel for only part of a week. This is an important factor that may discourage boat operators from introducing new services.

Whilst the study has identified several services that appear to have future potential, the development of water transport in Plymouth Sound and Estuaries as an attraction in its own right is seen as an issue of overriding importance. One of the study area's greatest assets is its water frontage and it is strongly believed that many visitors to the area will expect to have the opportunity to explore the area by boat. If greater numbers of visitors can be attracted onto the water, then the viability of a range of services will be enhanced. The quality of the landing facilities, the vessels, the availability of a range of routes and the quality of the marketing effort will all be important factors.

The introduction of Park and Sail at a location outside the city centre would allow visitors to travel to the city centre by boat and water transport tours to start at an accessible location with coach drop off and parking facilities. Easier access to water transport services could enhance its attractiveness to visitors and thereby increase demand. The benefits for the City would include a reduction in demand for city centre car parking and coach facilities and reduced congestion. Possible sites for a facility are now limited. Of the two sites considered by this study, the Embankment / Laira site appears to have most potential. The current urban design and transportation study of the Eastern Gateway to Plymouth will provide an opportunity for this site to be considered in a wider context. From a water transport perspective, the creation of a Park and Sail site could be one of the most effective ways of increasing water transport use by visitors.

11.2 Long Term Vision

If the conclusions outlined above are brought together and it is assumed that the planned development initiatives come to fruition, a long term vision for water transport in the study area could offer the following facilities and services:

- New state of the art landing facilities in the Barbican with:
 - Full accessibility for the disabled
 - Capacity for a number of vessels to berth at the same time (including enders from cruise ships)
 - Shore facilities including toilets, service and visitor information, ticketing, real time passenger information.
 - Public transport connections.
 - A high quality, attractive and welcoming built environment.
 - Appropriate retail and food/beverage outlets.

- A range of services from the Barbican to:
 - The Western Sound – a frequent circular water bus service, provided by more than one vessel, to the Hoe, Millbay, Cremyll, Royal William Yard, Devonport and Saltash.

 - The Plym – a water taxi service calling at Mount Batten and new landing facilities at Turnchapel, Oreston, Hooe and Coxside.

- The Upper Tamar Valley as far as Calstock with intermediate stopping off points.
- A Park and Sail location in the Cattewater. Various harbour cruise, fishing and activity services.
 - An enhanced service from Stonehouse to Cremyll with new facilities with full disabled access at both ends, possibly with a link to new landing facilities at Millbay.
 - A new service linking North Corner, Mutton Cove and Cremyll. Landing facilities at Mutton Cove and North Corner would be improved but may not allow full disabled access.
 - Ferry services operating in the Upper Tamar possibly as an extension of the Calstock Ferry, operating on a circular route linking points of demand. The service would be provided by simple open ferry boats. Landing stages would only be designed for disabled passengers if the larger vessels operating on the Barbican to Calstock route could berth.
 - The use of modern vessels, with passenger capacities and facilities to suit the particular service.
 - A co-ordinated marketing strategy aimed at promoting individual services and the concept of water transport as an attraction in its own right.

11.3 Short Term Action Plan

The Action Plan will to an extent depend upon the progress made on the various development initiatives within the study area. On the assumption that these are progressed broadly in line with current intentions the recommended actions in the short term are as follows:

Capital Projects

- .
 - **The construction of new landing facilities in the Barbican.** The current proposals for a new landing stage at Phoenix Wharf should be reviewed on the basis that the Barbican is at the 'hub' of a developing water transport network. Consideration should be given to providing a facility which accommodates *all* current services and incorporates *designed-in* potential for extension to accommodate new services as a key element of the overall vision for water transport in the Sound and Estuaries. The area in front of Commercial Wharf may be more appropriate for such a facility. Development on the water at this site could be integrated with development on the shore to provide ticket offices, visitor facilities including covered waiting areas and retail / refreshment outlets. The construction of the chosen scheme should be progressed as soon as funding, approvals and consents can be secured. Action Plymouth City Council.
 - **The development of Park and Sail facilities and services.** This will require an urgent re-examination of the Laira site to assess its viability and acceptability as a visitor Park & Sail location. The examination should include the assessment of the feasibility of providing a link to a landing stage on the south side of the Laira Bridge. This work could be included within the scope of the current Eastern Gateway Study. If viable and acceptable the scheme should be implemented as soon as practicable. If not viable then the potential of the Breakwater Road site as an alternative location should be explored. Action Plymouth City Council.
 - **The construction of new landing facilities for the Cremyll Ferry.** The proposals for the upgrade of the landing facilities at Cremyll should be reviewed to ensure that they include a rise and fall pontoon suitable for access by pedestrians of all levels of mobility and capacity for the berthing of more than one vessel at a time. On the Plymouth side a project to provide compatible new facilities in Stonehouse to replace Admirals Hard should be progressed. Action Mount Edgecumbe Joint Committee and Plymouth City Council.
 - **The development of new landing facilities at Mutton Cove.** Alternative design schemes for the facility that address access issues, the exposed location and the space restrictions should be developed and used as a basis for consultation. Action Plymouth City Council.
 - **Improvements to landing facilities on the Upper Tamar.** Projects should include the construction of a new facility at Cotehele along similar lines to the new landing stage at Calstock. Projects at other landing points should aim to improve access for vessels and safety for passengers. Action Tamar Valley Service.

Services and Transport Linkages

- .
 - **Joint Ticketing on the Tamar Corridor.** Investigation of the practicality of implementation joint ticketing of water transport, rail and bus services along the Tamar corridor. Action Tamar Valley Service.
 - **Establishment of New Services to Mutton Cove.** Discussions should be initiated with operators with a view to establishing a seasonal / weekend service from Mutton Cove to Cremyll and from Mutton Cove to the Upper Tamar. Action Tamar Valley Service.

Planning

- **Securing provision for landing facilities as part of new developments.** Designs for landing facilities, associated shore facilities and transport linkages should be incorporated into the plans and designs being developed for Millbay, Royal William Yard, The Hoe, the Naval Base Visitors Museum and the Coxside Centre for Marine Excellence. Action The SW Regional Development Agency and other promoters of new development.
- **Requiring private developers of waterside to include landings facilities within their developments.** The requirement for the construction of facilities should be accompanied by an obligation to maintain them without recourse to public funds. Action Plymouth City Council.

Management

- **The setting up of a Steering Group** drawn from a cross section of agencies ensure that proposals are undertaken in a comprehensive manner. The Group would identify specific funding opportunities and work with the key parties to ensure that projects are viable, meet funders' requirements and fit with the wider regeneration of the area. Action Tamar Estuaries Consultative Forum to initiate the establishment of a Steering Group.
- **The establishment of a Federation of Water Transport Operators** be encouraged to create a representative body to work with the Steering Group in the implementation of the Action Plan. Action Tamar Estuaries Consultative to initiate the establishment of a Federation of Water Transport Operators.
- That the bid by West Country Rivers Trust, for funding for a project to tackle obstruction to navigation in the upper estuaries, be supported. Action all Councils.

Design

The following actions will apply to organisations involved in the procurement of new facilities or vessels.

- That landing stages should, where realistically achievable, incorporate:
- Full disabled access at all states of the tide (limiting gradient of 1:12 on the access walkway and pontoon).
- A varying freeboard along the berthing edge of the pontoon suitable for a wide range of vessels.
- Sufficient depth of water at Lowest Astronomic tide to permit access by ferry vessels working in the Sound (approximately 1.5m).
- Within sheltered estuarial waters smaller facilities should be provided along the lines of the new landing stage at Calstock which allows disabled access at times when the larger ferries suitable for carrying disabled passengers can berth. If the facility will only be used by small traditional ferry boats then simple facilities which are safe for passengers would be appropriate.
- That shelters and toilets should be provided in close proximity to landing facilities.
- That where there are, or potentially will be, bus interchanges at ferry landing stages provision should be made for a 'real time' passenger information system.
- That new vessels should be designed and procured to be 'whole life' environmentally sustainable. Their propulsion systems should cause minimum pollution (including noise) and the detrimental effect of wash on the riverbanks should be avoided.
- That any vessel used in a ferry mode should be capable of carrying pedal cycles at reasonable cost and the terminals of both ferry and leisure services should be provided with secure cycle parking facilities.

Funding

- **Funding co-ordination.** The Steering Group referred to under 'Management' above will need assist in the identification of specific funding opportunities for projects within the scope of the Action Plan and ensure that available funds are targeted in a co-ordinated way. The potential sources of funds have been identified in the report.
- **Local Transport Plan Review.** The opportunity should be taken, in the forthcoming review of the Local Transport Plan, to insert in the programme and make a bid for funding for new landing facilities where cater for non-leisure services. This would include Park and Sail Facilities and improvements to facilities at Cremyll and Stonehouse. Action Plymouth City Council.

Marketing

- **The Development of a co-ordinated marketing strategy.** A strategy should be developed that aims to capitalise on; increased waterfront usage by Plymouth residents, more day trips by residents of surrounding districts, increased numbers of holiday short breaks to Plymouth, increased visits to friends and relatives in Plymouth, greater interest in Plymouth by those staying on holiday in surrounding districts and improved seasonal spread of water transport usage. The strategy should take account of the need to market water transport as an attraction in its own right.

It is suggested that the Tamar Estuaries Consultative Forum (and in due course the Steering Group) should take a lead role in co-ordinating the preparation of the strategy. Specific actions, which should be implemented in conjunction with local authorities and the private sector including boat operators and other transport providers would include the following:

- **Co-ordinated information and marketing about existing water transportation/cruises.**

The introduction of a joint ticketing scheme would be facilitated by a Federation of Water Transport Operators, along with in kind support from organisations such as Plymouth Marketing Bureau to get the scheme off the ground, and some limited supporting budget for printing and promotion of the scheme. This sort of scheme could take the form of a 'visitor passport' that allows travel and entry to different attractions over a period of time

- **The production of an annual leaflets** to promote water transport in the Sound and its Estuaries. The Cornwall County Council "*Car Free Days Out in South West Cornwall*" provides a good example of an integrated approach linking buses, trains, cycling and water transportation, as well as reasons to take trips. The South Hams District Council '*Out and About in the South Hams*' annual leaflet shows the importance of marketing visitor and leisure orientated transport in an integrated manner, tied in with reasons to make the trip.
- **Ensuring coverage in exiting guides.** The introduction of a common reference and logo, for example 'Visit by Boat!', in conjunction with joint ticketing initiatives, could enhance visitor recognition and the attractiveness of water transport.
- **The development of a website** to promote water transport and its links to other sustainable forms of travel within the area surrounding the Sound and its Estuaries. This website to be linked to the Tourism and City, District and County Council websites and to include ferry timetables and links to ferry and leisure sites.
- **Public Relations work**, particularly amongst Plymouth residents, including briefing of Tourist Information Centre staff and the arrangement of familiarisation trips.

Training

- **Maritime Competence and Safety.** Operators to ensure that all staff have access to maritime operations and safety training. Action Water Transport Operators.
- **Customer Care.** Operators should be encouraged to arrange training for their staff in customer care through existing initiatives such as 'Welcome Host' or new courses developed to suit their needs. Action Tamar Estuaries Consultative Forum to work with Operators, agencies such as Enterprise Plymouth and education providers.
- **Business Management.** Water transport operators should be targeted for business management advice to maximise service viability for a given level of demand. Action as above.

11.4 Medium to Long Term Action Plan

The action plan for the medium to long term will depend to a large extent upon the progress made on a number of key waterfront developments. Significant projects are likely to include:

- **The inauguration of a service to Hooe / Oreston** at a time when the proposed developments in the area have materialised. Public subsidy may be necessary in the early stages ensure that the service is financially viable. Action Plymouth City Council.
- **The promotion of a 'hail and ride' service to develop a water transport service towards the western Hamoaze and the west of the Sound** through existing cruise boat services when new landing facilities are completed. The use of the Federation of Operators (identified as a short term action) to set up routes, prices and times would provide an inclusive way to facilitate this sort of arrangement. Action Plymouth City Council to facilitate co-ordination.

In time, this service should be developed into a regular circular water bus service, operated by more than one vessel, linking the Barbican, the Hoe, Millbay, Mount Edgecumbe, Royal William Yard, Stonehouse, Devonport, the Naval Base Visitors Centre and Saltash.

- **The establishment of a service linking Stonehouse, Royal William Yard, Mutton Cove, Millbay and Cremyll** once development has progressed at Royal William Yard, Devonport and Millbay. Action Plymouth City Council.
- That means of funding a fully accessible landing facility for the Hoe is secured when available. Action Plymouth City Council.

11.5 Outcomes

The study has concluded that there are significant short-term opportunities and substantial longer term opportunities for enhanced water transport services in the Sound and Estuaries. Discussions indicate that the short-term opportunities are likely to increase the utilisation of existing craft and bring forward plans to invest in new vessels. It is likely that the increased utilisation will add to employment and if the marketing initiatives discussed above are able to improve the seasonal spread of visitors, then a greater proportion of the employment will be year-round.

It is envisaged that with adequate marketing and other support short to medium term employment targets of five additional full time jobs and eleven seasonal jobs could be achieved. Longer term employment targets could be substantially greater, although very difficult to assess at this stage.

In addition to the increased employment in the water transport operators themselves, there are likely substantial wider benefits. Water transport will help to secure the viability of tourist

attractions and other visitor-facing businesses through raising the profile of the waterfront and tangibly delivering customers. Even at an early stage, a firm stated public commitment to water transport can be used in attraction and other visitor facing facility business planning.

The presentation of water transport has the potential to be a key factor in the development of Plymouth and the surrounding districts as visitor destinations. If it is able to play such a role, then the employment supported will be very substantial.

The wider use of water transport is unlikely to lead to significant reductions in traffic congestion in peak hours. However, the introduction of Park and Sail, if feasible, could reduce the need for visitors to travel into the City Centre to find parking. This would lead to a reduction in seasonal congestion and the demand for parking, particularly in the Barbican area.

Acknowledgments

The assistance of the many consultees is acknowledged. Permission to use the following photographs is also acknowledged:

Section 6	Mount Edgecumbe Country Park
Appendix B	Tamar Passenger Ferry Tamar Cruising & Cremyll Ferry
Appendix F	Fal Water Taxi Fowey-Mevagissey Ferry Gosport Ferry