

**EXETER CITY COUNCIL****SCRUTINY COMMITTEE – ECONOMY  
10 MARCH 2011****UPDATE ON THE PROGRESS AND OUTCOMES OF  
THE EXETER VISITOR/TOURISM STRATEGY 2007 - 2010****1.0 PURPOSE**

- 1.1 The purpose of this report is to update members on the progress and outputs of the Exeter Visitor/Tourism Strategy 2007 - 2010 and to propose objectives as the basis for the preparation of the Exeter Visitor/Tourism Strategy 2011 - 2015.

**2.0 BACKGROUND**

- 2.1 Executive approved the Exeter Visitor/Tourism Strategy 2007 - 2010 on 13 March 2007 and implementation started from April 2007.
- 2.2 The aim of the Strategy was to:-  
“further develop the city as a nationally recognised visitor destination in a sustainable manner, focussing on Exeter's strengths as the regional capital as a leading, cultural, heritage and shopping destination, in providing jobs and supporting businesses. The intention is to increase tourism activity (visitor income) by 15% within the lifetime of the strategy”.
- 2.3 The focus of the strategy was on encouraging more short-break, day visitors and groups to the city and the surrounding area, thus increasing the level of tourist spend in Exeter.
- 2.4 Actions from the Visitor/Tourism Strategy form part of the Tourism Unit's annual work programme and 'Service Improvement Plan'.

**3.0 HEART OF DEVON TOURISM PARTNERSHIP**

- 3.1 Realising the tourism potential of the city goes hand in hand with exploiting opportunities presented within Exeter and the wider area. The key is to have a concerted effort to minimise duplication and where possible, pool resources and maximise promotion through an integrated approach. Over the past five years the Tourism Unit has been working on developing the Heart of Devon Tourism Partnership, which broadly covers the areas of Exeter, East Devon, Mid Devon and Teignbridge.
- 3.2 During the time of the strategy the Tourism Partnership was formalised and registered at Companies House. Funders of the Tourism Partnership include Exeter City Council, Exeter & the Heart of Devon Hotels & Restaurants Association, Axe Valley Promotions, the Blackdown Hills Business Association and local tourism businesses through an annual membership fee.
- 3.3 As of January 2011, membership of the Tourism Partnership stands at 303 tourism businesses, which covers mainly attractions, accommodation and eating out venues based within Exeter, East Devon, Mid Devon and Teignbridge. A target of 10 new members per month is in place, which is regularly met. 100% of income received is

spent on promoting the Heart of Devon regionally, nationally and where possible internationally.

- 3.4 There are 6 appointed board directors (main funders) and 5 elected board directors. Elected directors are appointed every two years at the AGM, the first was held July 2010. Some projects are undertaken in conjunction with Visit Devon and other tourism partnerships within Devon to avoid duplication, to achieve cost savings and greater impact.

#### **4.0 PROGRESS AND OUTPUTS OF THE VISITOR/TOURISM STRATEGY 2007 - 2010.**

- 4.1 The following four priorities were agreed and have been implemented in partnership with the business community in the city and the Heart of Devon Tourism Partnership. A benchmark set of indicators for measuring progress was set out and based on 2005 figures, as the latest available at the time of agreeing the strategy. An overview of progress and detailed outputs for the period of the Visitor/Tourism Strategy are listed under each priority area:

- 4.1.1 **Priority 1 - To build on Exeter's position as a year-round quality visitor destination** by developing in partnership a series of themed marketing campaigns to raise the profile of the city nationally, regionally and locally, aimed at increasing visitor numbers and spend.

##### **Progress:**

Themed marketing campaigns researched, developed and implemented aimed at day visitors, overnight stays and group organisers wishing to visit Exeter and the Heart of Devon. A full progress report covering the range of activities undertaken is set out in Appendix 1.

##### **Outputs:**

- unique website hits increased by 501% from 24,107 to 145,049, from 2006 (first year of website) to 2010;
- group bookings made through the Tourism Unit increased by 27% from 334 to 425 during 2005 to 2010;
- increase of 22% in the amount of people who visit the city to visit friends and relatives from 158,000 to 193,000 (between 2005 and 2009);
- an increase of 17% in the amount of day visitor trips to the city from £67.8 million to £79.5 million (between 2005 and 2009);
- a decrease of 13% in the amount people spend on an overnight stay in the city from £82.9 million to £71.6 million (between 2005 and 2009)
- an increase of 7% in the amount visitors spend in the retail sector in the city from £44.5 million to £47.6 million (between 2005 and 2009);
- an increase of 3.5% in the amount visitors spend on food & drink in the city from £43 million to £44.5 million (between 2005 and 2009);
- usage of Exeter's Park & Ride increased by 11% during the period 2005/06 to 2009/10.

- 4.1.2 **Priority 2 - To raise the quality and competitiveness of the visitor experience in Exeter** by developing and improving city attractions, events and visitor services.

##### **Progress:**

Both Exeter Visitor Information & Tickets and Exeter's Underground Passages refurbished and relocated to within the Princesshay development September

2007. A full progress report covering the range of activities undertaken is set out in Appendix 1.

**Outputs:**

- attendance at the Exeter Food Festival increased by 150% during the period 2004 – 2010;
- economic impact of the Tour Series in Exeter is estimated at £934k per event, which helps to support an estimated 3 FTE jobs in the city;
- Exeter featured within both 2010 Tour of Britain stages in Devon;
- supporting and promoting events and festivals within Exeter, including
  - Exeter Summer and Autumn Festivals;
  - Exeter Cathedral Concert Series;
  - Big Screen in the Park;
  - Exeter Festival of South West Food & Drink;
  - Animated Exeter;
  - Respect Festival;
  - Exeter Phoenix/Exeter Northcott/SpaceX/Barnfield programmes;
  - University of Exeter concerts and talks.
- increase in visitors going on a Red Coat Guided tour by 17% from 12,912 to 15,221 during 2005 – 2009;
- overall visitor usage of Exeter Visitor Information & Tickets has changed but increased by 6.8% from 111,533 to 119,127 during 2005 to 2010, with variations on different types of users:
  - visitors through the door – decreased by 12%;
  - emails received requesting information – increased by 373%;
  - telephone calls requesting information – increased by 31%;
  - letters received requesting information – increased by 39%.
- attendance increased at Exeter's Underground Passages when themed events held:
  - Exeter Blitz – attendance figures increased by 136% during the period 2008 – 2010.
  - Christmas crafts – attendance increased by 86% during the period 2008 – 2010.
  - Gory stories – attendance increased by 65% during the period 2008 – 2010.

**4.1.3 Priority 3 - To maximise economic benefits and employment opportunities from tourism** by strengthening the partnership with the business community and supporting improvements and additions to the accommodation stock.

**Progress:**

Heart of Devon Tourism Partnership formed with associated membership benefits. Two hotel developments completed, four due to be completed during 2001 - 2012. A full progress report covering the range of activities undertaken is set out in Appendix 1.

**Outputs:**

- 309% increase in membership levels to the Heart of Devon Tourism Partnership during the period 2007 - 2010, which allows for greater marketing of the area regionally and nationally;
- first Heart of Devon AGM held July 2010, first members seminar held November 2010;
- following the hotel study, a number of hotels are completed or due to be completed imminently:

- Jurys Inn, Western Way – 170 bedrooms (completed);
- Premier Inn, Bonhay Road – 102 bedrooms (imminent completion);
- Southernhay House, Southernhay – 10 bedrooms (2011 completion);
- Hotel Barcelona, Magdalen Street – 60 bedrooms (2012 completion);
- Mercure Southgate Hotel, Southernhay – 40 bedrooms (completed);
- Hampton by Hilton, Exeter Airport – 160 bedrooms (2011 completion);
- Visit Devon (DMO) established April 2008, as a partnership based company to promote collaborative marketing of Devon, nationally and internationally;
- 19.5% increase in employment supported by visitor spend within the city from 18,160 to 21,703 (between 2005 and 2009);
- 23 individuals took part in training courses in 2009 and 86 during 2010, ran by the Devon Tourism Skills Network and South West Tourism.

**4.1.4 Priority 4 - Improve the position of Exeter as a short break destination through sustainable tourism initiatives** by encouraging tourist facilities within Exeter to raise quality standards and to adopt a sustainable approach to tourism development.

**Progress:**

New coach drop-off facility opened at Exeter Bus & Coach Station and public transport included in all tourism literature. 38 Heart of Devon members have received quality awards. A full progress report covering the range of activities undertaken is set out in Appendix 1.

**Outputs:**

- during the period of the strategy, 39 businesses achieved accreditation through the Green Tourism Business Scheme, a national sustainable tourism certification;
- 7 members of Heart of Devon received a South West Tourism Excellence Award in 2010;
- 12 members of Heart of Devon received a Visit Devon Tourism Award in 2010;
- 13 members of Heart of Devon received a Taste of the West award in 2010;
- 6 members of Heart of Devon received a Quality Assured Visitor Attraction award through Visit England in 2010;
- 5 car free days out itineraries were developed and available to download from relevant tourism websites;
- usage of Exeter's Park & Ride increased by 17% during the period 2005/06 to 2009/10;
- over 90% of brochures produced by the Tourism Unit have been printed on recycled paper;
- the consumer email database increased from 500, to 42,000 contacts, to enable us to communicate with our past and potential customers more cost effectively and frequently, and to reduce paper based communications.

## **5.0 ECONOMIC CLIMATE**

- 5.1 Initially, the economic downturn was predicted to have a positive effect on the domestic tourism market, but this has been slow to develop, especially within regional cities like Exeter.
- 5.2 Visit England undertook national consumer research in September 2010; the results of this research concluded that:
- the rising consumer confidence in the economic situation was short-lived;
  - concern over the recession, job security and the future of personal finances continues to grow;
  - most concerned are women, 18-35 year olds, families, and particularly public sector workers;
  - almost two-thirds of people now feel the economic situation will get worse before it gets better;
  - 4 in 10 expect their financial position to worsen.
- 5.3 Information on headline national trends released by Visit England in November 2010 indicates that during 2010:
- overseas (inbound) visits were down by 2%, with spend down by 1%;
  - domestic overnight trips were down by 3%, with spend down by 7%;
  - visits to friends and relatives were down by 6% - traditionally a buoyant market.
- 5.4 The 2010 January South West Tourism 'How's Business Survey' reported that 42% of businesses (365) reported visitor numbers had decreased compared to the same period the previous year. Research undertaken nationally and regionally indicates that domestic and inbound tourism has suffered due to the national economic downturn and will continue to suffer.
- 5.5 Nationally, business tourism (conference, meetings and events) declined during the period of the Exeter Visitor/Tourism Strategy due to the economic downturn. This has had a difference on the amount of business visitors travelling and staying in the city, which has resulted in a reduction in overnights stays and overnight expenditure. This can be seen in Appendix 3.

## **6.0 PERFORMANCE MONITORING**

- 6.1 A set of key performance indicators were included in the Strategy as a basis for monitoring trends and the effectiveness of actions; these are listed within Appendix 2. Figures for 2005 were taken as the baseline as the most recent information available at the time.
- 6.2 Facilities managed by the Tourism Unit have seen a variation of increases and decreases ranging from +1221% to -43%. This has been attributed to better promotion of visitor facilities within the city, changes in visitor booking patterns and the current economic climate. In most cases, numbers particularly dipped in 2009 although website based activity has grown markedly.
- 6.3 The total number of people visiting Exeter Visitor Information & Tickets (EVIT) and the amount of accommodation bookings made through EVIT has fallen, in line with national trends. This is mainly the result of an increase in the usage of the internet and mobile phones, and people booking online before their visit to the area. The centre continues to be used by those wishing to visit the city, and once in the city, to receive

information on what there is to see and do and make their stay as enjoyable and stress free as possible.

- 6.4 The centre is also heavily used by residents of Exeter to gain information on events within the city, find information on where to take visiting family and friends, and to book theatre tickets for the Corn Exchange, Cygnet Theatre and other local cultural venues.
- 6.5 The 'Cambridge Economic Impact Model' is commissioned every two years (by South West Tourism) to estimate the volume and value of tourism to the South West economy. Data is then extracted for the sub-regions, including Exeter. The model draws down data from the United Kingdom Tourism Survey for domestic visitors, the International Passenger Survey and the England Leisure Day Visits Survey.
- 6.6 From the most recent Cambridge Economic Impact Model (2009), which can be seen in Appendix 3, it is estimated tourism is worth £159.7 million annually to the Exeter economy, with an overall increase of 0.1% from 2005 to 2009. According to the model it had grown 3.8% in 2008 to the start of the recession. Some 21,703 jobs are supported within hotels, attractions, cultural venues, eating out venues and transport facilities within the city, an increase of 19% from 18,180 in 2005. The employment figures are perhaps a better guide to growth within the sector, as these figures not being based on the same modelling.
- 6.7 Other main points arising from comparisons from 2005 to 2009 are that:
- spend from day visitors has increased by 17%;
  - spend from overnight stays has decreased by 13%;
  - visits to friends and relatives has increased by 22%;
  - the total amount of bed spaces within Exeter has increased by 14%;
- 6.8 Due to changes within the national economy Exeter has suffered in terms of the amount of people visiting the city for an overnight stay, primarily business users, so having an effect on the target set out within the Exeter Visitor/Tourism Strategy 2007 – 2010. The intention was to increase tourism activity (visitor income) by 15% within the lifetime of the strategy, according to the model; it has only grown by 0.1% by the end of 2009. This is however in contrast with the growth in day visitor activity. Business tourism activity has been increasing again in recent months. The continued increase in investment in additional bed spaces/hotels is also a very positive sign.
- 6.9 The Cambridge Economic Impact Model has to be treated with some caution, as for example it shows a drop in overnight trips and expenditure in 2009, which goes against information provided by the local industry. It is useful as an indicator of trends, but the absolute figures are the results of a model not comprehensive information. However, it is the main source of such data.

## **7.0 EXETER VISITOR/TOURISM STRATEGY 2011 - 2015**

- 7.1 It is proposed, building upon the immediate past strategy, that a new draft Exeter Visitor/Tourism Strategy will be prepared on the basis of the aims and priorities outlined below. This would then be presented as a draft consultation document to a cross section of the tourism industry, neighbouring authorities and key agencies involved in promoting and supporting tourism within Exeter, the wider area and the rest of Devon.
- 7.2 The aim of the new Strategy will be to:-  
 “Further develop the visitor economy in order to create and safe guard employment through the promotion and development of existing and new visitor facilities, focusing

on the strengths of Exeter as a regional cultural centre and the sub region of Heart of Devon - city, coast and country. The intention is to increase employment and tourism activity (visitor income) by 10% within the lifetime of the strategy”.

- 7.3 The following 5 priorities are suggested to be agreed with the tourism business community in the city, the Heart of Devon Tourism Partnership and Visit Devon and to form the framework for a detailed action plan:
- 7.3.1 Encourage and support market led investment in the visitor economy in Exeter; encompassing retail, food & drink, the arts, visitor attractions, accommodation and transport;
  - 7.3.2 Develop the visitor experience within Exeter maximising existing assets, so that it provides year round jobs and a vibrant economy;
  - 7.3.3 Raise skill levels of the existing visitor workforce and those entering employment;
  - 7.3.4 Develop consumer focused visitor marketing of Exeter and the Heart of Devon;
  - 7.3.5 Build on work already undertaken, to further develop the Heart of Devon Tourism Partnership to secure additional funding to implement more effective marketing of the area.
- 7.4 As part of the consultation process the draft strategy will also be available to download from [www.exeter.gov.uk](http://www.exeter.gov.uk) with a questionnaire for comments and in hard copy from the Tourism Unit.
- 7.5 Following the consultation period, a re-draft will be presented to a more limited group of representatives of the main public and private sector bodies prior to its further consideration by members and completion and adoption later this year.

## 8.0 FINANCIAL IMPLICATIONS

- 8.1 Council involvement and contribution towards delivering the new Exeter Visitor/Tourism Strategy will be met from within existing financial resources, reflecting reductions in next years budget, as summarised in the table below.

<b>Tourism Unit Budget</b>	<b>2010 - 11</b>	<b>2011 - 12</b>
Tourism Administration	£146,760	£148,920
Tourism Marketing	£105,220	£65,300
Exeter Visitor Information & Tickets	£153,030	£137,020
Exeter's Underground Passages	£95,770	£77,140
Quay House Visitor Centre (funded by ECQT)	£55,100	£55,100
Red Coat Guides	£17,320	£10,090
Heart of Devon Tourism Partnership (external funding)	£89,000	£89,000
<b>Total</b>	<b>£662,200</b>	<b>£582,570</b>

## 9.0 RECOMMENDED that:

- 9.1 Members note the progress and outputs of the Exeter Visitor/Tourism Strategy 2007 - 2010.

- 9.2 Members support the development of the Exeter Visitor/Tourism Strategy 2011 - 2015 based on the aim and five priorities as set out in paragraph 7.3 of this report.

**RICHARD BALL**  
**HEAD OF ECONOMY AND TOURISM**

**ECONOMY AND DEVELOPMENT DIRECTORATE**

**Local Government (Access to Information) Act 1985 (as amended)**

**Background papers used in compiling the report:**

1. Report to Scrutiny Committee - Economy 18 January 2007
2. Report to Scrutiny Committee - Economy 12 March 2009
3. Report to Scrutiny Committee - Economy 11 March 2010



## APPENDIX 1

**EXETER VISITOR/TOURISM STRATEGY 2007 – 2010  
DETAILED PROGRESS MADE AND ACTIVITIES UNDERTAKEN  
AGAINST KEY PRIORITIES**

**Priority 1 - To build on Exeter's position as a year-round quality visitor destination** by developing in partnership a series of themed marketing campaigns to raise the profile of the city nationally, regionally and locally, aimed at increasing visitor numbers and spend.

**Progress:**

- "Ahead for PR" appointed to raise the profile of Exeter and the Heart of Devon nationally;
- bi-monthly consumer e-newsletter sent to visitors requesting information on the Heart of Devon;
- participation in county wide journalist visits, ensuring Exeter is covered in all press articles covering Devon;
- St Nicholas Priory included in all heritage themed advertising to provide visitors with wider information on heritage attractions to visit in Exeter;
- all brochures and leaflets produced by the Tourism Unit available to download as PDF's from tourism websites, reducing postage costs;
- local company appointed to develop and implement a search engine optimisation campaign to increase unique website hits to [www.heartofdevon.com](http://www.heartofdevon.com);
- Heart of Devon Visitor Guide, Heart of Devon Group Organisers Guide, Exeter Mini Guide and Exeter Shopping & Parking Map produced as digital guides and available to download from tourism websites;
- new shopping website launched ([www.exetershopping.org](http://www.exetershopping.org));
- promotional shopping campaign delivered each year;
- partnerships developed with the Express & Echo and Heart FM to promote Exeter at Christmas locally and regionally;
- display boards promoting places to visit within Exeter, placed within empty shops;
- group booking facility expanded to include Exeter Cathedral and St Nicholas Priory;
- new Travel Trade Pass introduced for group organisers, to encourage more groups to visit Exeter and the Heart of Devon;
- Group Organisers Guide launched, covering Exeter and the Heart of Devon, to promote the area as a place to visit for groups;
- Group Privilege Card launched 2008 and updated 2010, covering a wide range of high street and independent retailers to encourage visitor spending;
- new coach drop-off point installed at Exeter Bus & Coach Station to encourage more UK and non-UK coaches to visit the city.

**Priority 2 - To raise the quality and competitiveness of the visitor experience in Exeter** by developing and improving city attractions, events and visitor services.

- Exeter Visitor Information & Tickets and Exeter's Underground Passages re-opened within the Princesshay development September 2007;
- Exeter's Underground Passages achieved Quality Assured Visitor Attraction award January 2010 and retained the award in January 2011. A quality assessment and management tool to help improve the service offered to customers;
- re-opening of the Quay House Visitor Centre after a period of refurbishment;
- Quay House Visitor Centre achieved Places of Interest Quality Assured award January 2011. A quality assessment and management tool to help improve the service offered to customers;
- remaining self guided heritage trail launched - Exeter Medieval Trail;

- Exeter was one of the locations for the 2009 and 2010 national 'Tour Series';
- parks & gardens featured within the Red Coat Guide annual programme of tours;
- Cricklepit Mill included and visited on Red Coat Guided tours, that visit the Quayside;
- training programme developed and implemented in conjunction with the Devon Tourism Skills Network and South West Tourism;
- autumn promotional campaign developed and themed events implemented to increase the amount of people who visit Exeter's Underground Passages during the winter months;
- Exeter's green spaces included in the annual Exeter Mini Guide and tourism websites;
- cycling in Exeter and the Heart of Devon featured in The Guardian and The Independent newspapers and website.

**Priority 3 - To maximise economic benefits and employment opportunities from tourism** by strengthening the partnership with the business community and supporting improvements and additions to the accommodation stock.

- company incorporated to deliver Heart of Devon Tourism Partnership activities, with the purpose of promoting the area for short breaks, long holidays and group visits. First AGM held July 2010 and first members seminar held November 2010. Membership scheme introduced and growing monthly, currently stands at 303 tourism businesses;
- new brand researched, developed and launched to promote the Heart of Devon area;
- training programme developed and implemented in conjunction with the Devon Tourism Skills Network and South West Tourism;
- Visit Devon (DMO) established April 2008 with General Manager and two support staff, development and promotional work ongoing e.g. new website launched ([www.visitdevon.co.uk](http://www.visitdevon.co.uk));
- Exeter Hotel Study produced 2007 by The Tourism Company, in partnership with East Devon District Council and Exeter City Council;
- new hotel stock promoted on tourism websites and included in press releases relating to investment within the city and new developments;
- build work started on the Flybe Academy, which includes a hotel and training academy for pilots, cabin crew and ground crew;
- work continues on promoting Sky Park and Science Park as sites for further hotel development;
- new shopping website [www.exetershopping.org](http://www.exetershopping.org) launched February 2009 with associated promotional campaign. All Exeter retail shops, attractions, accommodation and eating out venues listed free of charge;
- Exeter Tourism Forum established November 2007 with Terms of Reference. Meetings well attended by a wide range of city tourism related businesses.
- **Priority 4 - Improve the position of Exeter as a short break destination through sustainable tourism initiatives** by encouraging tourist facilities within Exeter to raise quality standards and to adopt a sustainable approach to tourism development.
  - public transport routes highlighted in all tourism promotional literature and websites;
  - themed car free days out itineraries available to download from tourism websites, covering shopping, walking, gardens and visiting historic sites within the Heart of Devon area to encourage visitors to travel around the area by public transport;
  - Park & Ride highlighted in all tourism promotional literature and tourism related websites;

- Code of Practice developed for group related accommodation and attractions within the Heart of Devon to ensure that groups receive readily available and helpful information on pricing, access, special offers and receive an excellent welcome;
- Devon seasonal recipes available to download from [www.heartofdevon.com](http://www.heartofdevon.com);
- directory published listing venues that sell or serve Fairtrade products within the city;
- encourage businesses to take part in award schemes related to their sector (South West Tourism Excellence Awards, Visit Devon Tourism Awards, Taste of the West and the Federation of Small Businesses).

## APPENDIX 2

## Tourism Performance Indicators

Tourism Performance Indicators related to the actions within the strategy	2005	2006	2007	2008	2009	2010	% + / - from 2005
Number of visitors to the Tourist Information Centre Comment: The fall in visitors to EVIT is due to a number of reasons, but particularly with visitors sourcing their own information, accommodation and tickets pre-arrival via the internet and the increased use of mobile phones and other devices. There have been issues with pedestrian signage which have now been addressed.	87,955	72,899	74,800	106,234	79,618	76,530	-12%
Number of accomm. bookings made in the Tourist Information Centre Comment: As above.	758	648	615	428	413	430	-43%
Number of visitors on a Red Coat Guided Tour Comment: The Red Coat Guides are dependant on good weather and due to us having a number of bad summers and winters; figures have reduced over the past 3 years. The amount of group bookings reduced during 2009 and 2010 due to issues with coach drop-off at Exeter Bus & Coach Station, which were addressed last winter.	12,912	14,617	18,114	17,204	16,125	15,221	17%
Number of Visitors to the Quay House Visitor Centre Comment: A new leaflet highlighted the Quayside and its attractions was produced which boosted visitor figures during 2008, but due to bad weather during 2009 and 2010 visitors to the Quayside dropped. The closure of the Quay House Visitor Centre during 2010, for a refurbishment, affected visitor numbers.	23,471	26,048	24,561	26,123	25,060	23,579	0%
Number of visitors to the Underground Passages Comment: The centre was closed for just over two weeks during the main 6 weeks summer holidays during 2009 due to a burst water main and subsequent repairs to the passages, resulting in a reduction of visitors. The introduction of themed events has improved visitor numbers to the attraction.	18,459	Closed	4,753	19,863	18,896	19,517	5%
Number of visitors to the RAMM Comment: Museum closed due to major refurbishment, due to open Autumn/Winter 2011-12.	233,408	247,000	192,025	Closed	Closed	Closed	N/A
Number of visitors to Exeter Cathedral Comment: 2008 saw the introduction of an admission fee and the official counting of visitors; previous attendance was estimated.	187,000	142,000	170,000	131,741	109,778	108,869	-42%
Unique visitors to city council website <a href="http://www.exeter.gov.uk/visiting">www.exeter.gov.uk/visiting</a> Comment: No data available for 2007, 2008 and 2009 due to the City Council website stats package contract ceasing.	33,087	30,312	Not known	Not known	Not known	437,210	1221%
Unique visitors to Tourism Partnership website <a href="http://www.heartofdevon.com">www.heartofdevon.com</a> Comment: The website is promoted on all promotional literature produced by the Tourism Unit, work is also undertaken to help improve the ranking within Google. This has resulted in a large increase in unique website hits.	24,107	28,596	40,508	42,258	134,206	145,049	501%
Group bookings made through the Tourism Unit Comment: Group bookings, each often representing at least one visiting coach, have increased during the period above due to increased promotion of the Tourism Unit's facilities through the group booking service. The fall in 2009 and 2010 was primarily due to	334	363	445	500	486	425	27%

issues relating to coach drop-off facilities at Exeter Bus & Coach Station, which has now been resolved.

## APPENDIX 3

## Cambridge Economic Impact Model

## Economic impact of tourism within Exeter

	2005	2008	2009	% + / - from 2005
TOTAL ACTUAL jobs	18,160	18,704	21,703	19%
Source: Business register and employment survey				
Day visitor trips	1,494,000	1,611,000	1,568,000	4%
Day visitor expenditure	£67.8 million	£80.8 million	£79.5 million	17%
Overnight trips	399,000	369,000	360,000	* - 9%
Overnight trips expenditure	£82.9 million	£74.7 million	£71.6 million	* - 13%
Visits to friends & relatives	158,000	173,000	193,000	22%
Other tourism expenditure	£8.8 million	£9.4 million	£8.6 million	- 2%
Bed spaces	5,881	5,921	6703	14%
<b>TOTAL TOURISM EXPENDITURE</b>	<b>£159.5 million</b>	<b>£164.9 million</b>	<b>£159.7 million</b>	<b>0.1%</b>
Source: South West Tourism				

\* Anecdotally, the local tourism accommodation providers do not concur with this negative figure in view of high levels of business activity at that time.