

Draft Exeter Visitor Strategy

2012 – 2015

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1.0 INTRODUCTION

- 1.1 Tourism is one of England's largest industries. A study of the visitor economy undertaken by Deloitte in 2010 estimated that England's visitor economy is worth £97 billion in total and is the third highest export earner behind chemicals and the financial services. The industry employs in excess of 2 million people and provides opportunities for employment including varied careers and many entry jobs into the labour market. For English tourism to thrive and grow, the industry must remain competitive in terms of cost and ease of access and must offer visitors great experiences in great destinations.
- 1.2 Tourism is defined as a "movement of people to places outside their usual place of residence, pleasure being the usual motivation", this implies some element of travel from their home. A thriving tourism industry creates beautiful places to visit all year round, which also improves the quality of life for everyone who lives in or near them as well.
- 1.3 Tourism is a flexible and versatile sector to work in and offers a range of entry level opportunities for school leavers, for people without formal qualifications, for those re-entering the workforce and for part-time or temporary employees. Tourism is particularly labour intensive compared to many other sectors but creates new employment opportunities. The success of the industry depends on a skilled workforce.
- 1.4 There are still opportunities to grow the tourism sector by making it more productive, competitive and profitable. Domestic tourism offers good growth potential because we currently take significant fewer 'staycation' (holidaying at home) holidays than many other European countries.
- 1.5 In a challenging economic climate, public sector support for the industry will be less readily available and in the short to medium term, the industry's private sector will operate under tighter budget constraints. This needs to be addressed within this Strategy.
- 1.6 Cities that have emerged as vibrant destinations have typically done so by developing a wide variety of cultural attractions and continually developing and adding to them. Residents are the main beneficiaries of tourism and retail developments, but they also offer visitors new experiences and reasons to visit.
- 1.7 Retail is a core part of the visitor offer, which can be seen in the value of tourism to Exeter in the next section. Shops do more than almost anything to influence the appeal of a destination and with the recent developments of Princesshay and the planned development of the old Debenhams building by John Lewis will certainly increase the appeal of Exeter regionally and nationally.

- 1.8 Tourism development is a central part of regeneration and economic development, it is important to create environments that are highly attractive in which the widest range of people will want to live, work and spend their leisure time. In other words a city should aim to be exceptionally “liveable”.
- 1.9 This Strategy has been developed with the ‘Exeter Vision’, proposed organisational changes and the current economic climate in mind. The aim of this Strategy is 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, including the Royal Albert Memorial Museum, focusing on the strengths of Exeter as a regional cultural centre. The intention is to increase employment and tourism activity (visitor income) by 5% within the lifetime of the strategy”*
- 1.10 Exeter is a key regional cultural, leisure and shopping destination and has the potential to play an even greater role in meeting the needs of visitors to Devon and the West Country. The most popular reasons for people choosing a ‘cultural’ tourism destination are listed below, all of which are very evident in Exeter and the Heart of Devon:
- Scenery
 - Climate
 - Cost of travel
 - Cost of accommodation
 - Historical interest
 - Environment
 - A complete change
 - Local food & drink
- 1.11 Exeter is a desirable place to live and contains an eclectic mix of environments from contemporary to historic cityscape. The city is close to a UNESCO World Heritage site (Jurassic Coast), two national parks and two Area’s of Outstanding Natural Beauty, all which help raise the profile of the city as a base or as a place for a day visit or short break.
- 1.12 Visitors to Exeter make a significant contribution to the local economy through their expenditure in supporting the development of new employment opportunities, improving standards of living, helping to increase the profile and positive image of the city and engendering local pride.
- 1.13 The planned re-opening of the Royal Albert Memorial Museum late 2011, presents Exeter with an exciting and enviable opportunity to gain extensive local, regional and national exposure as a destination investing in its product to attract more day and overnight visitors, groups and conferences to the city.
- 1.14 Implementation of this strategy is intended to bring many positive economic benefits to the city in sustaining and creating quality jobs within the tourism industry and increase the profile of Exeter as the regional capital of the South

West through private sector investment, as detailed in section four of this Strategy, and public sector investment in the extension and refurbishment of the Royal Albert Memorial Museum. Actions from this Strategy will continue to raise the profile of the city and the surrounding area regionally and nationally.

2.0 BACKGROUND

2.1 Previous Tourism/Visitor Strategy

The previous Tourism/Visitor Strategy for Exeter covered the period 2007 – 2010 and highlighted four priority areas for development. Even though the Strategy had to be undertaken amidst the economic downturn, there were a number of significant outcomes and development projects completed.

2.2 Some of these outcomes and development projects include:

- Princesshay development completed;
- Both Exeter Visitor Information & Tickets and Exeter's Underground Passages refurbished and relocated to within the Princesshay development;
- New coach drop-off facility opened at Exeter Bus & Coach Station;
- Four hotel developments completed, another two due to be completed imminently;
- Heart of Devon Tourism Partnership formed with associated membership benefits;
- 38 Heart of Devon members received quality awards;
- spend from day visitors increased by 17%;
- visits to friends and relatives increased by 22%;
- the total amount of bed spaces within Exeter increased by 14%;
- group bookings made through the Tourism Unit increased by 27%;
- usage of Exeter's Park & Ride increased by 11%;

2.3 Facilities managed by the Tourism Unit saw a variation of increases and decreases in their usage as summarised in the indicators later in this Strategy. These variations were attributed to better promotion of visitor facilities within the city, changes in visitor booking patterns and the current economic climate.

2.4 The Royal Albert Memorial Museum closed 2007 for an extensive period of time to enable an extension to be built, access to the Roman Wall to be incorporated to the Museum, complete refurbishment of the Museum, a new collections store to be built and existing collections to be redisplayed and reinterpreted. The closure of the Museum has had a negative impact on the amount of people visiting Exeter for a day or overnight visit, and shows the value of the Museum on the local economy.

2.5 Work will continue on the outcomes and progress made from the previous Tourism/Visitor Strategy, especially in the promotion of new facilities to build the awareness of what there is to see and do in Exeter, regionally and nationally.

Heart of Devon Tourism Partnership

2.6 Strong and developing partnerships have been running in Exeter with neighbouring areas for a number of years. Both the public and private sector

see the advantages of working together and pooling resources both financial and personnel as appropriate to achieve common aims. This principle underlies the Heart of Devon Tourism Partnership. The table on page 9 shows the economic value of tourism to Exeter and the Heart of Devon and highlights the need to work with neighbouring partners.

- 2.7 The Heart of Devon Tourism Partnership is the Area Tourism Partnership, and local membership organisation broadly for the areas of East Devon, Exeter, Mid Devon and parts of Teignbridge. The Tourism Partnership's aim is for the area to be recognised as one of the major holiday destinations within the region through all aspects of tourism promotion, including marketing to the consumer, group and conference market. The Heart of Devon's role is to help businesses to thrive, offer marketing and advertising opportunities, business support initiatives and membership benefits geared to attract the involvement of more tourism businesses whilst returning added value for their financial contribution.
- 2.8 The Tourism Partnership is a not for profit Company Limited by Guarantee and is led by a private/public sector partnership, ensuring that any profits made are put back into the marketing and development of successful tourism related businesses within the broad area covered by the Heart of Devon. The company was officially formed in 2009 and has grown from strength to strength in gaining more board directors, paid members and delivering more marketing activity. Within the first year of trading, membership was at 150. This has grown to 327 as of August 2011. The first AGM was held in summer 2010 with member seminars held in December 2010 and May 2011.
- 2.9 The Tourism Unit of Exeter City Council plays a leading role in supporting the Tourism Partnership in delivering marketing activity, delivering a range of membership benefits and working with our neighbouring local authorities. A selection of the marketing activities include:
- Website development and promotion
 - Search engine optimisation of www.heartofdevon.com
 - Issuing of press release promoting the destination and members
 - Inviting and briefing journalists to visit the area
 - Developing and implementing themed marketing campaigns promoting the destination and members (culture, family, activity, food & drink and shopping)
 - Social media – Twitter, Facebook, Flickr and blogging
 - Sending e-newsletters to our database of 45,000 email contacts
- 2.10 The Tourism Partnership continues to work towards a one-stop shop for both tourism businesses and potential visitors to the area. It is the Partnership's aim to continue to work with the private sector in creating new tourism promotional opportunities, better tourism support services and provide more information on latest developments in the tourism industry across Devon, the

South West and the UK. A well run Tourism Partnerships should speak for both the visitor and the visitor economy.

3.0 ECONOMIC CLIMATE AND MARKET OVERVIEW

3.1 Economic Climate

In the first three months of 2011 GDP grew by 0.5%, in the second three months GDP grew by only 0.2%. Economic recovery within the UK economy has been slower than predicted. The Office of National Statistics view is that growth has slowed due to a number of one-off factors, including the Japanese tsunami, the Royal wedding, Olympic ticket sales and the unseasonably warm weather.

3.2 Some of these one-off factors have a positive impact on the economy, such as the tourism industry. The warm weather in April boosted spending in hotels and restaurants with people holidaying within the UK.

3.3 Central government is still predicting future growth, but according to some economic analysts they may need to re-adjust their predictions.

3.4 The Exeter and the Heart of Devon (East Devon, Mid Devon and Teignbridge) sub-regional economy has remained to date fairly resilient in the economic downturn and will continue to be a base for many profitable businesses. The success of the area is underpinned by many factors including the quality of education, training and research, flexibility of the workforce, transport access, lower operating costs, availability of outstanding development sites, accommodation and housing and the undoubted overall quality of life in Exeter.

3.5 Over the past couple of years, there has been a small decline in the amount of overnight visitors to the area. This is primarily due to the economic downturn and less business visitors to the city. Business tourism activity is now increasing, primarily due to the upturn in the economy nationally, this upturn will be addressed through raising the opportunity for promoting Exeter again to the conference market.

3.6 As previous stated, the closure of the Royal Albert Memorial Museum has had a negative impact on the amount of people visiting Exeter, especially for a day visit. In 2009 there were 1.9% fewer day visitors to Exeter (compared to 2008), with the closure a major contributing factor. Prior to opening, the Tourism Unit will work with the management team of the Museum to ensure there is extensive promotion, especially locally and regionally, of the Museum to increase the amount of day visitors to the city.

Market Overview

3.7 The national economic situation has had a notable impact on the tourism industry. The national tourism body 'Visit England' has undertaken several research projects on the effect of the economic downturn.

- 3.8 Results of national surveys include:
- Fewer domestic and overseas holidays taken in 2010 than at any point in the past 5 years;
 - Over 75% feel the economic situation will get worse before it gets better;
 - Almost half of respondents now expect their financial situation to get worse;
 - Most affected by the economic downturn are 35-54 year olds, who account for over 40% of all domestic trips and spend;
 - For those that holidayed in England, it made them want to take more holidays in England;
 - Beyond 2011, the expectation is for more 1-7 night England breaks, but fewer 8+ night breaks;
 - 18-34 year olds, AB's socio economic group and families are more likely to continue to take more holidays in England beyond 2011;
 - Some 53% of the population make a trip to experience the atmosphere of a historic town at least once a year;
 - Longer breaks and countryside destinations deliver the best rated holiday experience;
 - Taking part in outdoor leisure pursuits leads to a more positive experience;
 - Self catering and camping holidays deliver the best accommodation experience;
 - Large cities and towns account for the most trips and spend but relatively fewer bed nights.
- 3.9 The main reasons for people to be likely to take more holidays in England are:
- Overall cost of the holiday/state of the economy;
 - To go somewhere new and explore the rest of the UK;
 - Return to a place they like;
 - Easier to holiday in the UK than overseas.
- 3.10 The latest data from the Great British Tourism survey shows that in April 2011, the number of domestic overnight trips taken in England was 8% higher than in 2010, with a 14% increase in the amount spent whilst on holiday. Both measures were at their highest level since the current survey began in 2006. This is likely to be a result of the double bank holiday combined with unusually warm spring weather as mentioned previously.
- 3.11 The future predictions for the tourism industry within England are positive, but there is still concern regarding the effects of the national economy on the industry.

Value of Tourism

- 3.12 According to the Cambridge Economic Impact Assessment, which was undertaken by South West Tourism in 2009, Exeter attracted some 1.94 million visitors who spent £159.7 million, supporting approximately 3,766 jobs in the city.
- 3.13 Shopping is the primary activity when visiting Exeter for a day visit and eating out for an overnight stay. With the planned retail developments within Exeter this will make it an even more appealing destination to visit for a day and overnight visit.
- 3.14 The table over shows a breakdown in the volume and value of tourism to the Exeter economy in 2009. Visitors are spending more when they visit Exeter for an overnight stay helping with the creation and protection of jobs within the industry.
- Day visitor spend - £50
 - Overnight visitor spend - £198
- 3.15 The table also highlights the importance of working with our neighbours. Approximately £181.5 million is spent by overnight visitors to East Devon, Mid Devon and Teignbridge on shopping, food & drink and visiting attractions.

Economic impact of tourism within Exeter and the Heart of Devon 2009

| | Exeter | East Devon | Mid Devon | Teignbridge | TOTAL |
|-------------------------------------|-----------------------|---------------------|----------------------|-----------------------|-----------------------|
| Direct actual jobs | 2,882 | 6,340 | 1,772 | 4,710 | 15,704 |
| Indirect actual jobs | 884 | 1,737 | 300 | 1,332 | 4,253 |
| TOTAL ACTUAL jobs | 3,766 | 8,077 | 2,072 | 6,042 | 19,957 |
| Day visits | 1,580,000 | 2,686,000 | 1,145,000 | 2,497,000 | 7,908,000 |
| Total Day visit spend | £79.5 million | £118.9 million | £49.6 million | £112.4 million | £360.4 million |
| ▪ Shopping | £34.9 million | £39.1 million | £18.1 million | £40.1 million | £132.2 million |
| ▪ Food & Drink | £29.5 million | £49.7 million | £19.8 million | £45.5 million | £144.5 million |
| ▪ Attractions & Entertainment | £7.7 million | £13.1 million | £6.0 million | £12.4 million | £39.2 million |
| ▪ Travel | £7.4 million | £17.0 million | £5.7 million | £14.4 million | £44.5 million |
| Overnight trips | 361,000 | 757,000 | 211,000 | 591,000 | 1,920,000 |
| Total Overnight trips spend | £71.6 million | £157.1 million | £35.8 million | £112.4 million | £376.9 million |
| ▪ Accommodation | £25.1 million | £58.1 million | £13.0 million | £41.2 million | £137.4 million |
| ▪ Food & Drink | £15.0 million | £34.3 million | £8.0 million | £24.9 million | £82.2 million |
| ▪ Shopping | £12.8 million | £22.7 million | £5.5 million | £16.4 million | £57.4 million |
| ▪ Travel | £10.1 million | £24.6 million | £5.5 million | £17.8 million | £58 million |
| ▪ Attractions | £8.6 million | £17.4 million | £3.8 million | £12.1 million | £41.9 million |
| Visits to friends & relatives spend | £8.5 million | £9.1 million | £5.2 million | £8.7 million | £31.5 million |
| Other tourism spend | £0.1 million | £1.9 million | £0.1 million | £0.6 million | £2.8 million |
| TOTAL TOURISM SPEND | £159.7 million | £287 million | £90.7 million | £234.1 million | £771.5 million |

4.0 DEVELOPMENTS

- 4.1 On the basis of existing tourist facilities, Exeter is seen as a traditional heritage destination within the South West. With the opening of Princesshay late 2007, at a cost of £225 million, the primary reason for visiting Exeter for a day visit has changed to shopping. Over the next 4 years Exeter will be undergoing a significant period of change due to a number of new visitor related developments, including:
- 4.1.1 **development and extension of the Royal Albert Memorial Museum** – refurbishment and extension of museum, re-display and re-interpretation of existing collection. New access to Roman Wall, due to re-open winter 2011. The re-opening presents an ideal opportunity for revisiting the coordinating of attraction promotions and co-ordination of other activities in the city.
 - 4.1.2 **development of Exeter's Historic Quayside** – mixed use regeneration of redundant buildings and water based activities, completion due 2012 – 2013.
 - 4.1.3 **Quay Climbing Centre** – dedicated indoor climbing wall and café located within the Old Electricity Works building, due to open September 2012.
 - 4.1.4 **cycle network along Exe estuary** – new National Cycle Network (NCN) around the Exe estuary from Exmouth to Dawlish, due to be completed financial year 2013 – 2014.
 - 4.1.5 **development of the old Debenhams building** – complete refurbishment of the building to house a state of the art John Lewis. It will offer an edited collection of products across fashion, home and electronics. Work will be undertaken on enhancing the junction of Paris Street and High Street to allow for restricted traffic access and greater public access. Due to be completed autumn 2012.
 - 4.1.6 **Exeter Airport** – proposed improvements and developments will provide a capacity of approximately 2 million passengers per year by 2015. To accommodate the predicted growth a series of extensions, development and modifications will take place on existing terminal buildings. Long-term parking will be developed on new land to the south east of the Airport. 160 bedroom Hampton by Hilton hotel due for completion by winter 2011.
 - 4.1.7 **Flybe Training Academy** – new Flybe training academy recently opened, which will be a centre of excellence providing training solutions for the needs of Flybe, Exeter International Airport and other organisations.
 - 4.1.8 **Chapter Hotel Exeter** – refurbishment and extension of Hotel Barcelona, new hotel due to open autumn 2012.
 - 4.1.9 **University of Exeter** – £275 million investment programme on the Streatham Campus to include projects such as the Business School expansion, INTO Academic Centre, refurbishment of the library and the flagship Forum. The Forum will be the main visitor and student

reception area for the University. It will be a mix of outside and inside space to include student services, retail, catering, technology-rich learning spaces and a 400-seat lecture theatre. Development work due to be completed summer 2012.

4.1.10 **University of Exeter, Thomas Hall** – 97 bedroom conference hotel and restaurant at Thomas Hall. Due to be completed 2012.

4.1.11 **Dean Clarke House** – 250 seater restaurant due to open Spring 2012 (Exeter's Cosy Club), located on the ground floor of the Halford Wing of Dean Clarke House.

Awaiting planning application for new hotel development, due summer 2011.

4.1.12 **Exeter Bus Station** – redevelopment of the Exeter Bus & Coach Station site, no formal plans submitted, at the time of writing. There is the opportunity to expand the city centre offer, with an enhanced bus station with overnight bus parking located elsewhere within Exeter.

4.2 Following a ten year period of major positive change the city continues to attract private sector investment, as shown above. The city centre is likely to grow physically to respond to this growth and deliver everything a great city of its potential size and status requires – such as the Exeter Bus Station development. The developments listed within this strategy show that there is private and public sector confidence in Exeter as a focus for investment, an important thriving centre for commerce, culture and leisure. The new City Centre Vision builds on successes realised to date and sets out a vision for the spatial development of the city centre over the next 15-20 years.

5.0 MARKET SEGMENTATION

5.1 During 2010 the Tourism Unit commissioned an Exeter based company (The Marketing Department) to undertake research on the type of visitor to Exeter and the surrounding area, Heart of Devon.

5.2 For the past 5 years the Tourism Unit has been collecting data on who requests a Visitor Guide on the area – name, address and postcode. To date there are over 105,000 contacts on the database. This database is an extremely valuable source of information on where customers live and provides ‘warm leads’ on people wishing to visit the area. This database was analysed through ACORN, which is a geodemographic segmentation of the UK’s population which breaks down small neighbourhoods and postcodes into 5 main categories and 17 groups (below):

- **Wealthy Achievers**, comprising of:
 - Wealthy Executives
 - Affluent Greys
 - Flourishing Families
- **Urban Prosperity**, comprising of:
 - Prosperous Professionals
 - Educated Urbanites
 - Aspiring Singles
- **Comfortably Off**, comprising of:
 - Starting Out
 - Secure Families
 - Settled Suburbia
 - Prudent Pensioners
- **Moderate Means**, comprising of:
 - Asian Communities
 - Post-Industrial Families
 - Blue Collar Roots
- **Hard Pressed**, comprising of:
 - Struggling Families
 - Burdened Singles
 - High-Rise Hardship
 - Inner City Adversity

5.3 The database we hold is considered to be broadly representative of the UK population as a whole, demonstrating the diverse appeal of the area and the range of things to see and do. The largest family categories found in the database are Secure Families and Struggling Families. Better off non-family groups are very well represented, such as the Affluent Greys and Educated Urbanities.

- 5.4 Over the last 5 years the database has increased numbers of contacts held in the second most affluent category – Urban Prosperity, which are well-educated and mostly prosperous people living in major towns and cities, including both older wealthy people and highly-educated younger professionals moving up the corporate ladder.
- 5.5 The characteristics of typical visitors to Exeter and the Heart of Devon:
- Originate from the South East, West Midlands or the South West;
 - Are approximately 45 – 54 years old;
 - Are from the C1 / A / retired socio economic class;
 - The majority have no children living at home (61%);
 - 76% have visited the area within the last 5 years;
 - The vast majority travel to the area by car (93%);
 - Prefer to stay for one week;
 - Prefer to stay in a self catering unit.
- 5.6 The research also gave an insight into what are the top factors for visitors choosing a holiday within the UK:
- Overall cost of the holiday;
 - Spending time outdoors;
 - Escaping from the crowds;
 - Being near the coast;
 - Visiting somewhere new.
- 5.7 And once on holiday within Exeter and the Heart of Devon, they like to enjoy the following activities:
- Eating and drinking out;
 - Walking;
 - Shopping;
 - Attending events & festivals;
 - Cycling.
- 5.8 Overall, 66% of respondents to the survey indicated that they are very likely to visit Exeter and the Heart of Devon. From the results of this survey, and the results of the survey undertaken by Visit England, work will be undertaken on our existing customer database to encourage them to visit Exeter and the Heart of Devon, instead of holidaying elsewhere within the UK. This will be undertaken through developing and implementing targeted thematic marketing campaigns, which recognise that many people are motivated by a particular activity or interest. It is also a useful mechanism to tie together a particular range of products and present them to our customers, such as activity holidays.

6.0 SWOT ANALYSIS

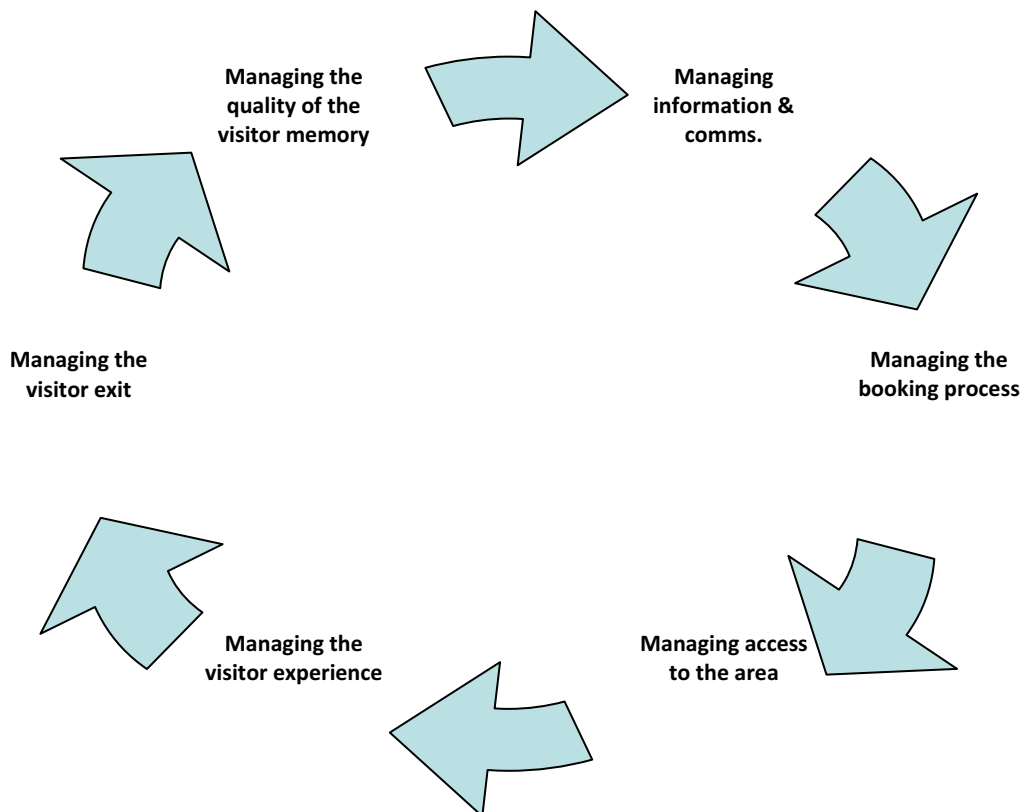
- 6.1 Exeter has an array of assets that mark out the City's offer as a place in which to live, work, trade, invest, visit and study.
- 6.2 It is going to be difficult for Exeter to stand out from the crowd, particularly as the majority of other destinations within the UK are promoting themselves heavily in light of the economic downturn and the 'staycation'. As mentioned in the Exeter Place Marketing Strategy, a weakness is its lack of an iconic symbol that grabs and holds national and international attention and places the City at the forefront of people's minds.
- 6.3 The SWOT analysis below has been produced listing some of Exeter's visitor assets and market conditions.

| | |
|--|--|
| <p>STRENGTHS</p> <p>Visitor & product</p> <ul style="list-style-type: none"> - Recent and planned new retail and hotel openings within Exeter - Excellent transport links train / road / air - Well regarded Museum (RAMM) - Very strong heritage appeal - Exeter International Airport within close proximity of the city centre - A well-established visitor destination - Close to the Jurassic Coast - Close to stunning countryside (Dartmoor National Park, East Devon and Blackdown Hills Area of Outstanding Natural Beauty) - Availability of local food & drink - Award winning and Top 10 University - Michael Caines: local chef, recognised regionally and nationally - Exeter Chiefs remain in the Premier League - Growth in German market due to city being a location for Rosamund Pilcher films <p>Market conditions</p> <ul style="list-style-type: none"> - Strong public/private sector tourism partnership - Regional admin hub - base for a large number of national organisations - Relatively low unemployment in the city - Employment cluster in tourism and food & drink | <p>WEAKNESSES</p> <p>Visitor & product</p> <ul style="list-style-type: none"> - Perception of travel time from the Home Counties & London - A sometimes old fashioned image of the area, in particular Devon - No readily identifiable iconic or internationally known building - Unpredictable weather patterns <p>Market conditions</p> <ul style="list-style-type: none"> - Perceived as expensive to holiday overnight - VAT rate of 20% remains the same - Reduced budget available through Visit Devon to promote the county |
|--|--|

| | |
|--|---|
| <p>OPPORTUNITIES</p> <p><i>Visitor & product</i></p> <ul style="list-style-type: none"> - The re-opening of the Royal Albert Memorial Museum - Olympics 2012 – Weymouth - An active ageing population - Growth in special interest and activity holidays - Cultural tourism including events, festivals, carnivals, regattas and music - People who live within the South West visiting Exeter - Expansion of conference facilities (University & Sandy Park) within Exeter - Grow the short break market within the city - New hotel openings during 2011 and 2012 - The opening of John Lewis, autumn 2012 <p><i>Market conditions</i></p> <ul style="list-style-type: none"> - Heart of Devon Tourism Partnership, further national promotion of the area - New route development at Exeter Airport - Emerging markets continue to grow – China, Russia, Brazil and India - Further growth in the staycation market - Merging of Area Tourism Partnerships within Devon to reduce back office costs | <p>THREATS</p> <p><i>Visitor & product</i></p> <ul style="list-style-type: none"> - Mortgage holders, public sector workers and 18-24 year olds report the worst outlook for their finances (Feb 2011) - Disposable income declined at fastest pace since Feb 2009 (Feb 2011) - Risk of Exeter being perceived as suffering from traffic congestion <p><i>Market conditions</i></p> <ul style="list-style-type: none"> - Economic growth reduces further - Rising oil / petrol prices making it more expensive to travel to the area - On-going growth in competition from other UK destinations - Unforeseen external factors such as weather (wet summer) - Reduction in membership levels of the Heart of Devon Tourism Partnership (reduced income) - Continued economic downturn - Competition from other European destinations |
|--|---|

7.0 THE VISITOR JOURNEY

- 7.1 The visitor experience is not just about when people are on holiday, their experience starts when a customer first searches for information on places to visit and stay and lasts right through to after they have departed.
- 7.2 The Visitor Journey ©, which was researched and developed by LiveTourism, has 6 stages where a positive impact can be made, it also enables destination managers to identify where there is overlap and duplication of activity and spending.
- 7.3 The Visitor Journey © model is a management tool that can be used for specific visitor attractions to improve customer service and increase visitor numbers. It can also be used by a destination, such as Exeter to improve access, increase awareness of the destination and thus increase the amount of people who visit.
- 7.4 The 6 stages of the Visitor Journey © can be seen below and will be an integral part of improving the visitor experience within Exeter. Ensuring visitors have an excellent experience from the first stage of the journey in making a decision on where to visit right through to managing their memory of their time in the city.



7.5 Managing Information and communication – planning of the journey, holiday and anticipation

This area looks at printed information a destination provides, as well as their website and other sources of information available. First impressions are important, a destination needs to look at the information they provide and are they providing information customers need. In terms of destination managers, a range of activities can be implemented to understand customers needs and wants more:

- Economic impact models
- Market intelligence
- Seasonal and themed marketing campaigns
- Visitor and information services (websites, printed guides and TIC's)
- Destination branding

7.6 Managing the booking process – booking the journey and holiday

How easy is it for a customer to book a holiday or accommodation within your destination. If a customer can't book quickly with you, they will book elsewhere! This area can be addressed through:

- Online booking available on destination website
- Early booking incentives
- Accommodation establishments having online booking on their own websites
- Can a customer book through another source, such as travel or booking agents

7.7 Managing access to the area – travel to the destination

How easy it is for a customer to reach your destination by car, by bus, by train or by plane? Once at the destination is the highway signage clear and is the local tourism map clear?

This area will be addressed through:

- Public transport to and within the destination
- Welcome audits at public transport interchanges
- Cycle access and information
- Itinerary planning once on holiday

7.8 Managing the visitor experience – the experience in the destination

Everybody appreciates a warm welcome when on holiday. How do you then make the rest of their visit an experience to remember?

This area will be addressed through:

- Improving the quality of visitor facilities (accommodation, attractions and eating out)
- Improving the customer service
- Encouraging private sector investment (new and existing facilities)

7.9 **Managing the exit – going home**

Leaving is still part of the visitor journey. How can a destination make a good final impression?

This area will be addressed through:

- Providing route information
- Encouraging visitor feedback
- Complaint handling, visitor facilities being consistent

7.10 **Managing the quality of the visitor memory – recollection of the experience**

Do keep in touch with visitors because you want them to come again. You can keep in touch with postcards, emails, newsletters or a Christmas card.

This area will be addressed through:

- Encourage businesses to keep in touch with their customer
- Visitor relationship management – e-newsletters
- Profiling previous visitors
- Surveying visitor likes and dislikes

8.0 VISITOR INFORMATION

- 8.1 Nationally the usage of Visitor Information Centres has reduced over recent years due to the rise in the use of the internet to source information on holidays, mobile devices (phones) and user generated content (social media).
- 8.2 In the UK 76% of the population, equating to 46.8m people, use the internet on a regular basis. The internet is regarded as the main source of information for travel planning and booking. 24% of the UK mobile phone users have browsed the internet with their handsets, smart phone usage grew by 193% from February 2009 to February 2010.
- 8.3 User generated content has grown exponentially and is becoming more sophisticated, particularly in terms of video content on YouTube. Consumers (visitors) will increasingly use their preferred sources, the most reliable, to inform their choices when choosing between places to visit in the UK and overseas. Work undertaken to promote Exeter and the Heart of Devon as a desirable visitor destination needs to take into account user generated websites and work with them to provide reliable and up to date information.
- 8.4 The provision of visitor information is not the same as marketing, although it is a vital part of the marketing process. Visit Britain's 2009 research into the economic impact of Tourist Information Centres confirms that destinations, such as Exeter, benefit substantially from hosting informed visitors who then stay longer and spend more in the destination and will potentially move onto neighbouring towns and villages, supporting the sub-regionally economy.
- 8.5 The provision of high quality visitor information can play a significant role in enhancing the overall visitor experience by creating a positive image of a destination and providing a hospitable and friendly welcome.
- 8.6 Businesses such as visitor attractions, hotels, retailers, restaurants, transport operators, car rental companies, public houses, village shops, petrol stations and post offices will find that they can increase their customer satisfaction by providing visitor information as part of their overall service.
- 8.7 A report is due to be released imminently from Visit England on the provision and development of visitor information. This report will need to be taken into account when looking at sustaining and developing the City Council's facility - Exeter Visitor Information & Tickets. There are early indications that Visit England is looking to broker new national partnerships including franchise agreements with key public/private organisations such as hotel chains, book shops and post offices to provide local visitor information. No further information has been made forth coming on these proposals. To ensure Exeter Visitor Information & Tickets remains viable, they need to provide excellent customer service, information that customers require, keep

costs to a minimum, keep pace with advances in technology and have great visibility.

- 8.8 Over the past couple of years pedestrian and highway signage has improved greatly to the Information Centre in Exeter, there are still occasions occurring with visitors unable to find the Information Centre quickly. An audit will be undertaken to help improve pedestrian and highway signage to the Information Centre to improve customer service and visitor numbers.
- 8.9 To ensure Exeter Visitor Information & Tickets and other the visitor facilities managed by the Tourism Unit provide outstanding customer service, there will be the requirement for staff to attend the range of 'Welcome to Excellence' courses. These include Welcome Host, Welcome Host Plus and the newly introduced Welcome Host Gold which is a practical course using training styles to give participants the skills and knowledge they can immediately use in the workplace. Welcome Host Gold has been introduced to give front line members of staff a greater understanding of customer service and the knock on effects of good customer service.
- 8.10 Since the Exeter Northcott transferred their Box Office up to the Theatre on the University Campus, work has been undertaken on utilising spare desk space and staff experience and skills within the Information Centre to develop the range of tickets on sale. During spring and summer 2011 the range and level of tickets sale has grown exponentially and beyond all expectations. This service will be continually developed as ticket sales are a valuable source of income for the Information Centre and brings in extra customers through the door. The activity is clearly providing a desired service by customers.

9.0 AIM AND PRIORITIES

9.1 It is important to be realistic about what can be achieved and supported. It is also important to build upon the achievements of the previous Visitor/Tourism Strategy and recent city centre developments by implementing the five agreed priorities in partnership with the tourism business community of Exeter and the Heart of Devon.

9.2 The aim of the strategy should 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, including the Royal Albert Memorial Museum focusing on the strengths of Exeter as a regional cultural centre. The intention is to increase employment and tourism activity (visitor income) by 5% within the lifetime of the strategy”

9.3 The following action plan details key areas of work within the tourism industry that need addressing over the next four years, taking account of market opportunities, developments in infrastructure and the wide range of capital investment taking place in and close to the city. The actions are grouped under each of the five priorities listed below.

9.4 The priorities for the Strategy are:

9.4.1 **Priority 1** - Encourage and support market led investment in the visitor economy in Exeter; encompassing retail, food & drink, the arts, visitor attractions, accommodation and transport

9.4.2 **Priority 2** - Develop the visitor experience within Exeter to make the most of existing assets, individually and jointly, so that the sector provides year round jobs and contributes to a vibrant economy

9.4.3 **Priority 3** - Raise skill levels of the existing visitor workforce and prepare those with the potential for entering employment in the sector

9.4.4 **Priority 4** - Develop more effective and targeted visitor marketing of Exeter locally, regionally and nationally

9.4.5 **Priority 5** - Build on work already undertaken to further develop the Heart of Devon Tourism Partnership, to secure additional funding, implement additional marketing of the area and broaden its business development activities

10.0 ACTION PLAN

- 10.1 Progress towards priorities and the relevant actions will be reviewed annually to ensure they are still tested under the five key priorities of the Strategy relevant to market conditions, opportunities and trends. The final version of this action plan following consultations will include timescales for delivery.

| Priority 1 - Encourage and support market led investment in the visitor economy in Exeter; encompassing retail, food & drink, the arts, visitor attractions, accommodation and transport | | | |
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| REF | ACTION | PARTNERS | OUTCOME |
| 1.1 | Help to deliver sustainable mixed use development in Exeter through the production of a master plan for the development of Exeter Bus Station | Stagecoach DCC Land Securities Private investors | New city centre bus station, to include mixed use development |
| 1.2 | Work with public transport providers to provide integrated transport with bus links to the main train stations and visitor destinations in Exeter and the Heart of Devon | Stagecoach First DCC Dartline Country Bus | Residents and visitor able to visit the main attractions in by public transport |
| 1.3 | Work with public transport providers to improve existing bus services from Exeter Airport to the city centre, stopping at Honiton Road Park & Ride for Sowton & the Met Office | Stagecoach Exeter Airport | Reliable and frequent bus service from the airport to the city centre, linking in with the arrival of flights |
| 1.4 | Work with Stagecoach to develop suitable facilities for visiting coach drivers at Exeter Bus Station | Stagecoach Land Securities | An increase in coaches visiting Exeter due to improved facilities for drivers |
| 1.5 | Work with Exeter Airport, First Great Western and Stagecoach to undertake 'Welcome Audits' at the main points of entry for visitors to ensure signage and information available is suitable for a friendly and welcoming visit | Exeter Airport First Great Western Stagecoach | Improved customer service, signage and welcome for visitors. |
| 1.6 | Work with existing visitor attractions in Exeter to ensure they | Visitor attractions | Improved customer service and visitor |

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| | understand and respond to the expectations of visitors and residents | within the city | numbers at attractions. Time spent in the city increase. |
| 1.7 | Work with visitor related businesses relocating or opening in Exeter to ensure they receive media exposure locally, regionally and nationally | PR agency Businesses relocating to the city ED | Greater range of visitor attractions and facilities available. Enhanced exposure of Exeter regionally and nationally. |
| 1.8 | Undertake a comprehensive visitor survey in Exeter to understand the needs and concerns of our customers/visitors and help inform any future development of the visitor experience and promotion of the city | City Centre Manager E&HODHRA City visitor attractions City eating out venues | Greater knowledge and understanding of the visitor needs and requirements informing actions to improve the visitor experience and promote repeat visits. |
| 1.9 | Work with new hotel openings within Exeter to ensure the facility is promoted to the short break, conference and group market, where suitable | Private investors PR agency | Increased awareness of the extent and quality of Exeters offer as a visitor, conference and group destination. Increase in visitors to the city. |
| Priority 2 - Develop the visitor experience within Exeter to make the most of existing assets, individually and jointly, so that the sector provides year round jobs and contributes to a vibrant economy | | | |
| REF | ACTION | PARTNERS | OUTCOME |
| 2.1 | Work with the Planning Department to ensure the interpretation, signage and experience of the city's quarters is informative, engaging and accessible | Planning Department City Centre Manager City centre traders Quay traders | Increased resident and visitor awareness of the quarters within Exeter. Businesses within the quarters adopt the quarters. |
| 2.2 | Investigate the potential to introduce 'meet & greet' ambassadors for day visiting coaches, guiding visitors to the Information Centre, attractions, shops and eating out venues | Stagecoach Potential sponsor EVIT City centre attractions | Increase in the amount of coaches visiting, and staying longer. Increase in visitor numbers to visitor attractions. Increase visitor spend. |
| 2.3 | Promote the concept of quality as an attraction to visitors and in terms of the image of the city, to tourism businesses within Exeter & | Attractions, accommodation, | Increase in visitors who then stay longer and spend more within Exeter. |

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| | the Heart of Devon | eating out venues, transport providers | |
| 2.4 | Investigate the potential for Exeter to enter the national Purple Flag scheme www.purpleflag.org.uk | City Centre Manager City attractions retail and eating out venues Cleansing Car parks | Exeter is promoted as a safe and clean place to visit for a night visit. Increase in the amount of people visiting Exeter. |
| 2.5 | Develop walks and itineraries that are integrated with the main public transport hubs and meet the needs of the visitor within Exeter and the Heart of Devon | Stagecoach First Country Bus Devon & Cornwall Rail Partnership SWCP EDONAB BHAONB | Increase in public transport use. Increase in the amount of people using Exeter as a base for a walking holiday. |
| 2.6 | Work with Devon County Council on improvements to the national tourist brown signs scheme currently being reviewed by central government | DCC | Improved highway signage (brown signs) throughout the city promoting key attractions. |
| 2.7 | Review and develop Exeter Visitor Information & Tickets in light of reduced budgets, to include investigating: <ul style="list-style-type: none"> • having shared use within the Information Centre with a suitable tourism related business • having attended mobile information point(s) around the city • having unattended visitor information point(s) throughout the city | EVIT Land Securities Enjoy England Event venues | Increased awareness of EVIT. Increased visitor footfall and income. Increased bookings and repeat visiting. |

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| | <ul style="list-style-type: none"> the use of volunteers within the Information Centre the benefit of maintaining or increasing tickets sold within the Information Centre | | |
| 2.8 | Develop existing visitor facilities that are less weather dependant through either events or product development, to extend and increase their appeal to visitors throughout the year | City centre attractions | Extended off peak season. Increase in visitor numbers and spend. |
| 2.9 | Support, through promotion, a range of events and festivals that can increase visitors to Exeter | City centre events and event venues. | Increase in event promotion, awareness and visitors to Exeter. |
| 2.10 | Support the development of local stewardship / visitor payback programmes for visitors and residents that encourage a greater understanding in the need to care for the city and it's environment. Pilot Scheme introduced by South Hams District Council – On the Right Tracks, where a small levy on refreshments sold to visitors produces a fund for investment in environmental improvements | Exeter attractions, eating out venues and accommodation. Countryside Team DWT | Scheme introduced to implement improvement schemes within and surrounding Exeter. |
| 2.11 | Provide timely, accurate and efficient information on Exeter for visitors, online and through other media sources | City Centre Manager HODTP | Increase in website hits to www.exetershopping.org Enhanced Exeter information available on various visitor websites Increased awareness of Exeter as a visitor destination and increased numbers of visitors. |
| 2.12 | Work with the Red Coat Guide committee in improving the service offered to visitors and groups | Red Coat Guides | Increase in new and repeat visitors on guided tours. Increase numbers of booked tours. |
| 2.13 | Research the potential for alternative forms of delivery and management for Exeter's Underground Passages, providing suggested alternatives by December 2011 | | Greater investment in the visitor attraction. Potential for economies. |

| Priority 3 - Raise skill levels of the existing visitor workforce and prepare those with the potential for entering employment in the sector | | | |
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| REF | ACTION | PARTNERS | OUTCOME |
| 3.1 | Introduce Welcome to Exeter and Welcome to the Heart of Devon familiarisation visits for local tourism facilities and services, primarily aimed at front line staff | DCC SWTA Exeter College | Frontline members of staff have greater knowledge of Exeter & the Heart of Devon visitor facilities. Increased level of customer service and reputational / image benefits. |
| 3.2 | Ensure that all Tourism Unit frontline members of staff have been trained in Welcome Host, Welcome Host Plus and Welcome Host Gold | Exeter College SWTA | Increased customer service and repeat visitors to visitor attractions and Exeter. |
| 3.3 | Develop a short training programme for taxi companies and their drivers to be ambassadors for the city | Licensing Dept. Taxi operators | Taxi drivers have greater knowledge of events, attractions and accommodation in Exeter. Increased customer service and reputational / image benefits. |
| 3.4 | Investigate the provision of work trial, work experience within visitor facilities managed by Exeter City Council to raise skills and experience | Exeter College E&HODESB | Volunteers receive the relevant skills and experience to enable them to enter employment within the tourism industry. |
| 3.5 | Ensure that staff working within visitor facilities managed by the Tourism Unit are able to transfer skills and experience between facilities | EVIT Quay House Visitor Centre Underground Passages | Staff able to work in all centres managed by the City Council. Potential to reduce staffing budget and greater flexibility of operations. Increased customer service. |
| 3.6 | Work with the Economic Development Team to produce and implement sector development plans, specific to tourism and food & drink, to support the development and creation of businesses and jobs | Exeter College E&HODESB Visitor attractions and accommodation | Business development and skills training plans for the tourism and food & drink sector. Increase in investment in the sector. |

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| | | | City Centre Manager | Well run, quality businesses based in the city. |
| 3.7 | Ensure that there is strong support for the tourism and food & drink sector within the Heart of the South West Local Enterprise Partnership for Exeter and the Heart of Devon | Exeter Chamber of Commerce DCC HODTP | LPE provides effective support for strategic infrastructure and other developments including access to development funding. | |
| 3.8 | Work with the Exeter & the Heart of Devon Employment & Skills Board: <ul style="list-style-type: none"> to ensure new hospitality businesses are supported through the recruitment of new staff and ongoing staff development to help existing hospitality businesses recruit significant numbers of new staff, through either expansion or the opening of a new season to assist tourism businesses to set up and support apprenticeships to bid for funding to support and help deliver leadership and management training for hospitality businesses | E&HODESB Exeter College HOSWLEP DCC Exeter Chamber of Commerce | Increase in level of customer service. Reduced staff turnover. Reduce unemployment within the city. New businesses to the city are able to recruit qualified and experienced staff. The city's reputation grows as a desirable location to relocate to. | |
| Priority 4 - Develop more effective and targeted visitor marketing of Exeter locally, regionally and nationally | | | | |
| REF | ACTION | PARTNERS | OUTCOME | |
| 4.1 | Differentiate Exeter from other cities within the UK, through promotional activity and events that highlight the unique character of the city | Event organisers and venues Attractions Visit Devon | Awareness of Exeter grows nationally as a vibrant and cultural place to visit. Attendance at city events and venues increases. | |
| 4.2 | Work with the management team of the Royal Albert Memorial Museum to: <ul style="list-style-type: none"> promote the re-opening of the visitor attraction, due to re- | RAMM PR Agency Visit Devon | Substantial press publicity achieved regionally and nationwide. Increase in visitor numbers and spend to | |

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| | <p>open December 2011, locally, regionally and nationally</p> <ul style="list-style-type: none"> • develop short break packages with accommodation providers promoting national touring exhibitions • share expertise and resource in order to improve promoting the Museum, other visitor attractions and the city as a heritage and cultural destination • promote the facility as a conference and meetings venue • promote the facility to group organisers and schools • develop joint ticketing of heritage attractions within the city • ensure that a selection of the Red Coat Guided tours incorporate and visit the Museum • ensure that all heritage attractions are cross marketed within each facility, on printed guides and websites | <p>Local press Local accommodation providers Heart of Devon</p> | <p>Exeter.</p> |
| 4.3 | <p>Promote Exeter through the use of social networking, viral marketing, smartphone apps and new technologies</p> | <p>Website hosting company</p> | <p>Increased awareness of Exeter to a younger audience. Increased attendance at visitor attractions and events.</p> |
| 4.4 | <p>Work with Devon County Council on the promotion of the completed 'Exe Estuary Trail' - due for completion financial year 2013 – 2014</p> | <p>DCC HODTP Visit Devon Sustrans</p> | <p>Increase in people visiting the city and using the city as a base for cycling holidays.</p> |
| 4.5 | <p>Develop a brand for the promotion of Exeter to the visitor market, complementing the Heart of Devon brand and reviewing 'It's a Capital City'</p> | <p>HODTP City Centre Manager Exeter Chamber of Commerce Visit Devon</p> | <p>Increase the awareness of Exeter. Increase in visitor numbers and spend to the city. Businesses throughout the city adopt the brand.</p> |

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| 4.6 | Translate key visitor publications, and or information, (available to download as PDF's) into German, Italian, Spanish, French, Russian and Dutch | Twinning Associations University of Exeter | Overseas visitors visit more attractions within the city. Overseas visitors spend more time and money within the city. |
| 4.7 | Work with the organisers of the Olympic Torch Relay to ensure a safe and enjoyable event is held and Exeter gains national exposure on radio, TV and press | Torch relay organisers Arts & Festivals Team Exeter event organisers DCC – Highways Cleansing PR agency City Centre Manager | Substantial regional and national promotion of Exeter. Increase in visitors to Exeter. |
| 4.8 | Re-design and re-launch the website www.exetershopping.org with an associated promotional campaign | City Centre Manager Exeter Chamber of Commerce City centre retail businesses City centre attractions and accommodation | New website launched. Increase in website hits. Increase in awareness of the city. Increase in visitors and spend to the city. |
| 4.9 | Develop and implement a plan for the co-ordinated promotion of cultural and visitor attractions (including the Museum) to attract more visitors and exploit their income earning potential | RAMM St Nicholas Priory City visitor heritage and cultural attractions PR agency | Promotional and management plan developed. Increase in visitors and spend to the city. Increase in visitors to individual attractions. |
| 4.10 | Audit regional and national tourism websites covering information on Exeter to ensure data is up to date and covers all visitor facilities | Tourism Unit | Information on Exeter is up to date on other tourism regional and national websites |

| Priority 5 - Build on work already undertaken to further develop the Heart of Devon Tourism Partnership, to secure additional funding, implement additional marketing of the area and broaden its business development activities | | | |
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| REF | ACTION | PARTNERS | OUTCOME |
| 5.1 | Work with the organisers of the Exeter Food & Drink Festival in the promotion of the event locally, regionally and nationally | Food Festival organisers PR agency Food producers HODTP Visit Devon | Increase in visitors to the Food Festival. Increase in visitors and spend to the city. Increase in awareness of Exeter. Regionally and nationally as a 'foodie' destination. |
| 5.2 | Support and encourage the implementation of the Heart of Devon brand throughout Exeter and the rest of the Heart of Devon to build the profile of the 'Heart of Devon' brand in the marketplace | HODTP HODTP members Visit Devon PR agency | Members and Tourist Information Centres adopt the Heart of Devon brand. Heart of Devon brand recognised as the mark of a known visitor destination. |
| 5.3 | Increase local, regional and national PR of the Heart of Devon area and its members through the appointment of a specialist PR agency to ensure Heart of Devon is featured in regional and national newspapers and magazines | DOTP HOD members Visit Devon PR agency | Heart of Devon is featured in 12 national newspapers / magazines. Increase in visitors and spend to the Heart of Devon area. |
| 5.4 | Commission a regular visitor economic impact assessment for Heart of Devon (STEAM, Cambridge or a suitable alternative) | Research company City attractions City accommodation | Report produced which assists monitoring effectiveness of actions detailing: <ul style="list-style-type: none"> trends in visitor numbers how much visitors spend within Exeter and the Heart of Devon where they spend their money jobs supported by visitor spend |
| 5.5 | Work with Devon County Council, relevant Parish Council's and | DCC | Two new interpretation centres open. |

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| | other bodies on the development and promotion of two new Jurassic Coast interpretation centres at Exmouth and Seaton | Parish Councils HOD members | Regional and national promotion of Seaton, Exmouth and the Heart of Devon. Increase in visitors and spend to Seaton and Exmouth with potential additional visitors to Exeter. |
| 5.6 | Work with the Jurassic Coast team in the promotion of the Jurassic Coast (East Devon), to build the profile locally, regionally and nationally as a must visit destination with consequential benefit for Exeter businesses | TIC's along the Jurassic Coast HOD members DCC Visit Devon Jurassic Coast team PR agency | Jurassic Coast featured on regional and national tourism websites. Extensive information on the Jurassic Coast is featured within www.heartofdevon.com Jurassic Coast featured in national newspapers and magazines. Increase in visitors and spend in the area. |
| 5.7 | Establish a formal network of Tourist Information Centres (TIC's) within the Heart of Devon to develop best practice, new forms of income generation, co-ordinated cross selling and cross marketing and to keep TIC's informed of Heart of Devon promotional activity | HOD TIC's | Improve visitor services and promotion. TIC's hold up to date information and feature other areas within the Heart of Devon. TIC's work collectively to achieve economies of scale in bulk purchasing. Visitor numbers to TIC's increase. |
| 5.8 | Work with Visit Devon and the other Area Tourism Partnerships within Devon to ensure that Devon is featured in Visit England promotional campaigns which will enable Devon to gain exposure through national and international promotional campaigns | HODTP Visit South Devon Dartmoor North Devon + Plymouth English Riviera | Devon and thereby Heart of Devon featured in national and international promotional campaigns co-ordinated by Visit England. Website hits to www.heartofdevon.com increase. |

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| | | | <p>Visit Devon PR agency Visit England HOD members PR agency</p> | <p>Devon is featured in national magazines and newspapers.</p> |
| 5.9 | <p>Increase the online presence of Heart of Devon, and destinations within, within other official and non-official tourism websites</p> | <p>Visit Devon HOD members PR agency</p> | <p>Information on the Heart of Devon features prominently on other tourism regional and national websites. The awareness of the 'Heart of Devon' increases. Website hits and page views on www.heartofdevon.com increase. Visitor numbers increase.</p> | |
| 5.10 | <p>Develop a new business tourism website (www.conferencedevon.com) and marketing campaign promoting conferencing within Exeter and the Heart of Devon</p> | <p>HOD conference members Visit Devon PR agency</p> | <p>New website launched. All Heart of Devon conference members featured on the new website. Increase in conferences and meetings held within the Heart of Devon. Increase in visitor numbers and spend. Business tourism/conference campaign implemented. Additional conference business generated.</p> | |
| 5.11 | <p>Develop and implement a group marketing campaign promoting Exeter and the Heart of Devon to group organisers</p> | <p>HOD group related members Visit Devon PR agency</p> | <p>Increase in the amount or groups visiting the Heart of Devon. Increase in visitor numbers and spend from additional groups, tours and visits. Group campaign implemented.</p> | |

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| 5.12 | Develop and implement a consumer marketing campaign promoting Exeter and the Heart of Devon, taking into account previous research, targeting Secure Families, Flourishing Families, Affluent Greys and Educated Urbanites | HOD members Visit Devon PR agency | 3 themed marketing campaigns launched each year to promote Heart of Devon nationally. Increase in visitors and spend to Heart of Devon. Increase in website hits to www.heartofdevon.com |
| 5.13 | Work with Visit Devon, Visit Cornwall and the 5 other Area Tourism Partnerships within Devon to promote the West Country overseas | PR agency Visit Devon Visit Cornwall Visit South Devon Dartmoor North Devon + Plymouth English Riviera HOD members | Increase in website hits to www.heartofdevon.com Increase in overseas visitors and spend to the Heart of Devon. Increase in visitor numbers to TIC's and attractions. |
| 5.14 | Work with the Board of Directors of the Heart of Devon to ensure a sustainable financial footing for the Tourism Partnership | HOD members HOD board directors | Heart of Devon becomes more self financing to deliver marketing activity and membership benefits. |
| 5.15 | Develop an attractive range of membership benefits for new and existing members of Heart of Devon | HOD members HOD board directors Visit South Devon Dartmoor North Devon + Plymouth English Riviera Visit Devon | Membership to Heart of Devon grows by 10%. Increase in income to Heart of Devon. Business performance and development activities increased. |
| 5.16 | Work with the 5 other Area Tourism Partnerships within Devon on | Visit South Devon | Joint projects developed county wide to |

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| | joint projects to achieve economies of scale – for example website procurement | Dartmoor North Devon + Plymouth English Riviera Visit Devon HOD members | achieve economies of scale to the benefit of all ATP's within Devon, with the following investigated: <ul style="list-style-type: none"> • PR • Website procurement • Advertising • Print • Photography • Business development |
| 5.17 | Promote the Heart of Devon through the use of social networking, viral marketing, smartphone apps and new technologies | Website hosting company PR agency | Increased awareness of the Heart of Devon to a younger audience. Increased attendance at visitor attractions and events within the Heart of Devon. Higher occupancy for Heart of Devon members. |
| 5.18 | Review the Heart of Devon accommodation inspection scheme to ensure businesses are safe, clean and legal, and to improve the quality of accommodation within the Heart of Devon. Scheme to relate to other existing accommodation inspection schemes throughout Devon | Visit South Devon Dartmoor North Devon + Plymouth English Riviera Visit Devon HOD members | Accommodation inspection scheme is less confusing. Less complaints from visitors. Increase in quality businesses and thereby the image of the sector within the Heart of Devon. |
| 5.19 | Research and develop activity/adventure tourism to increase the awareness of what there is to see and do within the Heart of Devon | HOD members Visit Devon Activity providers EDAONB | Increase in activity/adventure tourism to Heart of Devon. Information on activity/adventure tourism on www.visitdevon.co.uk and |

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| | | <p>BHAONB MDDC EDDC Jurassic Coast team</p> | <p>www.heartofdevon.com increases. Increase in visitors and spend to Heart of Devon.</p> |
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Abbreviations from action plan:

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| DCC | Devon County Council | MDDC | Mid Devon District Council |
| ED | Exeter City Council, Economic Development | EDDC | East Devon District Council |
| E&HODHRA | Exeter & the Heart of Devon Hotels & Restaurant Association | RAMM | Royal Albert Memorial Museum |
| EVIT | Exeter Visitor Information & Tickets | HOSWLEP | Heart of the South West Local Enterprise Partnership |
| SWCP | South West Coast Path | DWT | Devon Wildlife Trust |
| EDAONB | East Devon Area of Outstanding Natural Beauty | HODTP | Heart of Devon Tourism Partnership |
| BHAONB | Blackdown Hills Area of Outstanding Natural Beauty | SWTA | South West Tourism Alliance |
| E&HODESB | Exeter & the Heart of Devon Employment & Skills Board | | |

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11.0 PERFORMANCE INDICATORS

11.1 The following are the current range of performance indicators. Early actions will be to review these to performance indicators to measure the outcome of the Visitor Strategy, improving services to customers and measuring economic impact.

| Tourism Performance Indicators | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|--|--|-------------|-------------|-------------|-------------|-------------------|
| Number of visitors to the Tourist Information Centre | 87,995 | 72,899 | 74,800 | 106,234 | 79,618 | 76,530 |
| Number of accommodation bookings made in the Tourist Information Centre | 758 | 648 | 615 | 428 | 413 | 430 |
| Number of others users of the Tourist Information Centre (tel, fax & email) | 23,082 | 28,817 | 26,924 | 40,471 | 44,445 | 40,719 |
| Number of visitors on a Red Coat Guided Tour | 12,912 | 14,617 | 18,114 | 17,204 | 16,125 | 15,221 |
| Number of visitors to the Quay House Visitor Centre | 23,471 | 26,048 | 24,561 | 26,123 | 25,060 | 23,579 |
| Number of visitors to the Underground Passages | 18,459 | Closed | 4,753 | 19,863 | 18,896 | 19,517 |
| Number of visitors to RAMM | 233,408 | 247,000 | 192,025 | Closed | Closed | Closed |
| Number of visitors to Exeter Cathedral | 187,000 | 142,000 | 170,000 | 131,741 | 109,778 | 108,869 |
| Number of group bookings made through the Tourism Unit | 334 | 363 | 445 | 500 | 486 | 425 |
| Number of unique visitors to City Council website www.exeter.gov.uk/visiting | 33,087 | 30,312 | Not know | Not known | Not known | 196,456 (May-Dec) |
| Number of unique visitors to Tourism Partnership website www.heartofdevon.com | 24,107 | 28,596 | 40,508 | 42,258 | 134,206 | 145,049 |
| Number of accommodation bookings made through tourism website (start 2011) | n/a | n/a | n/a | n/a | n/a | n/a |
| | This data is being collected from summer 2011 onwards. | | | | | |
| Value of accommodation bookings made through tourism website (start 2011) | n/a | n/a | n/a | n/a | n/a | n/a |
| | This data is being collected from summer 2011 onwards. | | | | | |

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13.0 APPENDICES

13.1 NATIONAL, REGIONAL AND SUB-REGIONAL ORGANISATIONS

Visit England

- 13.2 VisitEngland is the country's national tourist board, its primary role is to grow the value of tourism by working in partnership with the industry. VisitEngland launched the first national tourism strategy for England in ten years, "England: A Strategic Framework for Tourism 2010-2020". The strategy is intended to be a blueprint for growth and aims to maximise tourism's contribution to the economy, employment and quality of life.
- 13.3 Work undertaken by VisitEngland is broken down into four key areas:
- *Research and insights* – providing data, intelligence and analysis to the industry and government, and industry communications.
 - *Integrated marketing* – develop promotional campaigns working with both the commercial and public sector, including TV, press and digital promotions.
 - *Business support* – implementation of national quality standards, modernisation of visitor information and championing the visitor experience.
 - *Partnerships* – working with a range of partners throughout the country to ensure successful delivery of the Strategic Framework and forging national commercial partnerships to optimise routes to market.
- 13.4 Where possible, the Heart of Devon Tourism Partnership will work in conjunction with Visit England in the promotion of the area. Our primary aim is to ensure data on www.enjoyengland.com is correct, relevant and inspires people to visit this area.

Tourism Alliance

- 13.5 Established in 2001 the Tourism Alliance, with the support of the CBI and the Secretary of State for Culture, Media and Sport, comprises of almost 50 tourism industry organisations that together represent some 200,000 businesses of all sizes throughout the United Kingdom.
- 13.6 The main purpose of the Tourism Alliance is to lobby government both in the UK and Brussels on the key strategic issues facing the industry. Other areas of activity include, identifying and developing policies and strategies to raise standards and promote quality within the industry and working with and lobbying government on all key issues relevant to the growth and development of tourism and its contribution to the economy.
- 13.7 Working with the Heart of Devon Tourism Partnership, and other Area Tourism Partnerships within Devon, we will work with the Tourism Alliance to raise the profile of the industry and consult with members on proposed changes to legislation affecting businesses.

South West Tourism / South West Tourism Alliance

- 13.8 South West Tourism was the regional tourist board for the South West and was funded by the South West Regional Development Agency to deliver its strategic statutory remit for tourism. Due to the changes in Central Government the South West RDA is being abolished and funding ceased to South West Tourism as of 31 March 2011.
- 13.9 As a result of the demise of South West Tourism there was a call for a regional tourism body from leading membership organisations, business groups and iconic businesses within the South West, and the South West Tourism Alliance (SWTA) was formed.
- 13.10 SWTA is intended to provide a shared voice for the tourism industry and the collection of data and intelligence. It is also to ensure that individual membership organisations work together to maximise economies of scale. The overriding principle of the Alliance is to support the industry and to improve the visitor experience in a cost effective and sustainable manner. The objectives are:
1. To represent, advocate and champion tourism in the South West and be a voice for its tourism industry;
 2. To guide sustainable and balanced development of the visitor economy;
 3. To collect data and provide intelligence to enable the competitive performance of the industry.
- 13.11 Exeter City Council as well as The Heart of Devon Tourism Partnership will work with the South West Tourism Alliance in delivering its objectives.

Heart of the South West Local Enterprise Partnership

- 13.12 The Local Enterprise Partnership which covers Exeter and the Heart of Devon was formed in spring 2011 under the leadership of the private sector and supported by all local authorities within the catchment area. The priorities for the partnership include job creation and business expansion, developing skills and boosting wages as well as creating the right conditions for economic growth.
- 13.13 The board of directors will lead on delivering the priorities of the Local Enterprise Partnership. The Heart of Devon Tourism Partnership will liaise with these board directors on a regular basis to ensure that tourism is at the forefront of priorities and actions delivered by the Heart of the South West LEP.
- 13.14 The following priority areas and actions of the LEP will have a direct impact on the tourism/visitor industry within Exeter and the Heart of Devon.

13.14.1 **Job creation:**

- Secure growth in our key urban centres and facilitate job creation across the heart of the South West, ensuring that market towns and rural areas are closely linked to urban growth and also economically successful in their own right.
- Provide support to strong sectors across the area such as tourism, food and drink, and land-based industries to grow employment opportunities through improving business profitability and productivity.
- Create the conditions for high levels of business start-ups and increase the numbers of jobs in expanding SMEs

13.14.2 **Productivity:**

- Coordinate and secure improvements to infrastructure, including superfast broadband and electrification of our rail network, key road improvements and housing, which underpins the success and prosperity of our businesses and communities

13.14.3 **Earning:**

- Achieve higher levels of earnings by improving skills and educational attainment levels, giving individuals across all our communities more choice and access to a wider range of employment opportunities

Visit Devon

13.15 The county wide Destination Management Organisation for Devon – Visit Devon – has gone through a period of change over the previous two years, primarily due to changes in funding and staffing. The six Area Tourism Partnerships within Devon (Heart of Devon, North Devon Plus, English Riviera, Dartmoor, Plymouth and Visit South Devon) along with Visit Devon, will continue to work collaboratively to promote Devon as a great place to visit, for an overnight stay or day visit – under the banner of Visit Devon.

13.16 Visit Devon will act as the voice of the tourism/visitor industry in Devon with the aim of increasing the number of visitors to Devon by promoting the county as a year-round destination for business or leisure. Any marketing activity will promote the Devon website - www.visitdevon.co.uk

13.17 Work undertaken will include:

- **Themed marketing campaigns** – a number of high impact themed campaigns to promote Devon at the highest level, including regionally, nationally and internationally.
- **PR** – a programme of weekly press release distribution, in conjunction with a specialist PR agency, to influence regional, national and international journalists to visit and feature Devon.

- **Website promotion** – work is undertaken, in conjunction with a specialised search engine optimisation company, to increase the amount of website traffic to www.visitdevon.co.uk