

Exeter Visitor Strategy

2012 – 2016

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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 and works 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 UK residents 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 tourism industry will be less readily available and in the short to medium term, the industry's private sector will operate under tighter budget constraints.
- 1.6 Cities that have emerged as vibrant destinations have typically done so by investing in the public realm and landscape, and 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 development of the old Debenhams building by John Lewis will certainly increase the appeal of Exeter regionally and nationally. But we should not lose sight that Exeter's heritage offer, of 2,000 years of history, is still a big draw for people visiting the city.
- 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" – day and night.
- 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 safeguard 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 visitor expenditure by a minimum of 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 | ○ Historical interest |
| ○ Climate | ○ Environment |
| ○ Cost of travel | ○ A complete change |
| ○ Cost of accommodation | ○ Local food & drink |

- 1.11 The night-time economy in Exeter is important in drawing people to visit and stay in the city overnight. The night-time economy encompasses restaurants, theatres, cinemas, bars, clubs and other cultural venues; all of which play a role in the Exeter night-time economy. The University of Exeter student population helps support the night-time economy in Exeter and allows venues to

remain open during the traditional quieter visitor season of October to March.

- 1.12 The number of students at the University has increased by 4,000 since 2007, to almost 18,000 which helps support the cultural offering in Exeter. Graduation and University open days are an important date in the Exeter calendar with students, parents and relatives staying in the city for extended weekends. The Exeter University Alumni of some 70,000 ex-students play an important role in being ambassadors for the city.
- 1.13 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 (Dartmoor and Exmoor) and two Areas of Outstanding Natural Beauty (East Devon and the Blackdown Hills), all which help raise the profile of the city as a base for a short break or as a place for a day visit.
- 1.14 Research undertaken by VisitBritain in 2005 shows the importance of "World Heritage" sites as a key tourist draw. Exeter needs to draw on the close proximity of the Jurassic Coast UNESCO World Heritage Site as a reason to visit Exeter for a short break and to act as one of the gateways to the Jurassic Coast.
- 1.15 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.
- 1.16 Exeter Cathedral plays an important role in Exeter, not just as a place of worship and education, but as a place to visit and has done since medieval times. The Cathedral is currently the most visited place in Exeter for both day and overnight visitors. The Cathedral's Third Millennium fundraising Campaign aims to raise £8 million to preserve, conserve and support three areas of cathedral work: music, fabric and the library and archives. To date approx £6.7 million in income and pledges has been raised to support the work of the campaign to improve the fabric of Exeter Cathedral for future generations.
- 1.17 Exeter is seeing a rapid growth in the amount of German and Austrian visitors to the city through both independent and organised group tours. This is primarily down to Exeter being featured in German screenplay adaptations of books by Rosamund Pilcher. This rise is set to continue and should be taken

advantage of through the promotion of Exeter in Germany and Austria. Michael Morpurgo's book War Horse is now an acclaimed film, having been filmed on Dartmoor. Visit Devon is working with Dreamworks to promote Dartmoor and the rest of Devon nationally and internationally. Film tourism plays an important role in drawing people to a destination, as well as the economic benefits of hosting film crews during production.

- 1.18 The re-opening of the Royal Albert Memorial Museum presents Exeter with an exciting and enviable opportunity. It allows the city 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. The holding of national touring events and exhibitions by the Royal Albert Memorial Museum will help draw people into the city from other parts of Devon, the West Country and further afield.
- 1.19 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 through both public and private sector investment, and increase the profile of Exeter as the regional capital of the South West. 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 performance 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 in 2007 for an extended period of time to enable an extension to be built, access to the Roman Wall to be incorporated into the Museum, complete refurbishment of the building, a new collections store to be built and existing collections to be redisplayed and reinterpreted. The closure of the Museum is likely to have had a negative impact on the amount of people visiting Exeter for a day visit in view of its previous popularity, and shows the value of a good regional museum on the local economy.

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

Heart of Devon Tourism Partnership

- 2.6 Effective 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 12 shows the economic value of tourism to Exeter and the Heart of Devon and highlights the need to work with our 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 Tourism Partnership'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 surplus income is 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.
- 2.9 The Tourism Unit of Exeter City Council plays a leading role in supporting the Tourism Partnership in delivering marketing activity, a range of membership benefits and working with our neighbouring local authorities.
A selection of the marketing activities include:

- website development, optimisation and promotion of www.heartofdevon.com;
- regular press releases promoting the destination, members, developments and new openings;
- inviting and briefing journalists to visit the area to secure feature articles;
- developing and implementing themed marketing campaigns promoting the destination and members (culture, family, activity, food & drink and shopping);
- social media – Twitter, Facebook, Flickr, YouTube and blogging
- sending e-newsletters to our expanding database of 45,000+ email contacts;
- sending direct mail to our expanding database of 120,000+ names and addresses.

2.10 The Tourism Partnership continues to work towards a one-stop shop for both tourism businesses and repeat and new 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 quarters of 2011, GDP grew by 0.5%, 0.2% and 0.5% respectively. Economic recovery within the UK economy has been slower than predicted. The Office for Budget Responsibility forecasts put growth at 0.9 per cent for 2011 and at 0.7 per cent for 2012 – sharply downgraded from 1.7% and 2.5% respectively.

3.2 One-off factors have a positive impact on the economy, especially the domestic tourism industry. The warm weather in April boosted spending in hotels and restaurants with people holidaying within the UK.

3.3 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 and the surrounding area.

3.4 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 fewer business visitors to the city. Business tourism activity is now increasing, primarily due to the slight upturn in the economy nationally, raising the opportunity for promoting Exeter again to the conference market.

3.5 As previous stated, the closure of the Royal Albert Memorial Museum is likely to have 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 contributing factor. Tourism Officers 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 number of day visitors to the city.

Market Overview

3.6 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.

3.7 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.

3.8 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.

3.9 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.

3.10 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

- 3.11 According to the Cambridge Economic Impact Assessment, which was undertaken by South West Tourism in 2010, Exeter attracted some 1.95 million visitors who spent £165.6 million, supporting approximately 3,888 jobs in the city. From 2009 the value of tourism to Exeter increased by 3.69%, primarily due to a 22% increase in the number of overnight visitors to the city.
- 3.12 As shown in the table overleaf, shopping is the primary activity when visiting Exeter for a day visit and eating out whilst taking 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.
- 3.13 Business tourism plays an important role in Exeter's economy, it greatly supports the accommodation sector Monday to Thursday as many business trips involve an overnight stay. In 2010 business tourism contributed approximately £8.6 million to the accommodation sector in Exeter which does not take into account room hire, refreshments and evening entertainment. More businesses setting up in Exeter will help support the growth in business tourism.
- 3.14 The table overleaf shows a breakdown in the volume and value of tourism to the Exeter economy in 2010. 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 - £183
- 3.15 The table also highlights the importance of working with our neighbours. Approximately £119.5 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 2010

	Exeter	East Devon	Mid Devon	Teignbridge	TOTAL
Direct actual jobs	2,950	5,211	1,807	4,822	14,790
Indirect actual jobs	938	1,321	302	1,337	3,898
TOTAL ACTUAL jobs	3,888	6,532	2,109	6,159	18,688
Day visits	1,517,000	2,710,899	1,149,000	2,577,000	7,953,899
Total Day visit spend	£76.9 million	£119.8 million	£49.8 million	£115.5 million	£362 million
▪ Shopping	£33.7 million	£39.3 million	£18.2 million	£40.9 million	£132.1 million
▪ Food & Drink	£28.6 million	£50.1 million	£19.9 million	£46.9 million	£145.5 million
▪ Attractions & Entertainment	£7.4 million	£13.2 million	£6 million	£12.8 million	£39.4 million
▪ Travel	£7.2 million	£17.2 million	£5.7 million	£14.9 Million	£45 million
Overnight trips	442,000	508,000	198,000	594,300	1,742,300
Total Overnight trips spend	£81 million	£103.6 million	£36.4 million	£112 million	£333 million
▪ Accommodation	£28.9 million	£37.6 million	£13.2 million	£40.9 million	£120.6 million
▪ Food & Drink	£17.7 million	£23 million	£8.1 million	£25 million	£73.8 million
▪ Shopping	£13.4 million	£15.1 million	£5.4 million	£15.8 million	£49.7 million
▪ Travel	£12.1 million	£16.7 million	£5.8 million	£18.3 million	£52.9 million
▪ Attractions	£8.9 million	£11.2 million	£3.9 million	£12 million	£36 million
Visits to friends & relatives spend	£7.6 million	£8.4 million	£4.8 million	£8.1 million	£29 million
Other tourism spend	£0.1 million	£1.9 million	£0.1 million	£0.5 million	£2.8 million
TOTAL TOURISM SPEND	£165.6 million	£233.7	£91.1 million	£236.1 million	£726.8 million

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South West Tourism – Cambridge Economic Activity Model

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 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 the museum, re-display and re-interpretation of existing collections and new access to the Roman Wall. The re-opening in December 2011 presents an ideal opportunity for revisiting the coordinating of attraction promotions and co-ordination of other visitor activities in the city.
 - 4.1.2 **development of Exeter's Historic Quayside** – mixed use regeneration of redundant buildings and water based activities, due for completion 2012 – 2013.
 - 4.1.3 **Quay Climbing Centre** – dedicated indoor climbing wall and café located within the Old Electricity Works building, opened September 2011.
 - 4.1.4 **cycle network along Exe estuary** – new National Cycle Network (NCN) around the Exe Estuary from Exmouth to Dawlish. Visitor facilities to be developed at RSPB nature reserves at Exminster and Topsham located on the NCN. Due to be completed financial year 2013 – 2014.
 - 4.1.5 **RSPB family bird hide and trail** – new visitor developments proposed at Darts Farm for family activities. Due to be completed 2012 – 2013.
 - 4.1.6 **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.
 - 4.1.7 **Exeter Airport** – proposed improvements and developments will provide a capacity of approximately 2 million passengers per year by 2015, economic indications will probably delay this. 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 to be completed late 2012.

- 4.1.8 **Flybe Training Academy** – new Flybe training academy opened in 2011, which is a centre of excellence providing training solutions for the needs of Flybe, Exeter International Airport and other organisations.
- 4.1.9 **Magdalen Chapter Hotel** – complete refurbishment and extension of Hotel Barcelona; new hotel due to re-open spring 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 (Exeter's Cosy Club) located on the ground floor of the Halford Wing of Dean Clarke House. Due to open mid 2012.
- 4.1.12 **Exeter Bus Station** – mixed use redevelopment of the Exeter Bus & Coach Station site, no formal plans submitted at 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.
- 4.1.13 **Exeter Cathedral Library** – Opening of refurbished library to include environmentally controlled archive room, enhanced reading and learning areas, lift to all floors and enhanced fire and security. Due to open Spring 2012.
- 4.1.14 **Tuckers Hall** – development involves the creation of new space to the rear of the Hall allowing for improved access to the Hall and the installation of an Interpretation Centre, new kitchen and toilets. Due to be completed 2012.
- 4.1.15 **Hotel development, Honiton Road** – Planning application submitted September 2011 for a new 120 bed hotel and conference centre, located adjacent to the Met Office.
- 4.1.16 **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 and will offer opportunities for arts and cultural development. 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. Due to be completed summer 2012.
- 4.1.18 **Hotel development, Southernhay East** – Planning application submitted December 2011 for a 120 bed hotel, offices, cafe/restaurant and basement parking on two levels

4.2 With Exeter City Council's and Devon County Council's investment in improving the cycling and walking network in and around the city, there is great potential to promote Exeter as a

hub for cycling and walking. Within 30 minutes you can be either cycling or walking in outstanding countryside.

- 4.3 Following a ten year period of major positive change the city continues to attract private sector investment, as is 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.
- 4.4 Exeter's strategic location as the gateway to the West Country and planned developments present significant potential to develop and promote Exeter more strongly as a regional tourist centre. It is important that all partners work together to enable Exeter to stand out from the crowd in the competition for investment in these times of economic uncertainty.

5.0 MARKET SEGMENTATION

5.1 During 2010 the Tourism Unit commissioned an Exeter based company (The Marketing Department) to undertake research on the types of visitors attracted 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, postcode and where possible, email address. To date there are over 105,000 postal contacts and 45,000+ email addresses 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 that breaks down small neighbourhoods and postcodes into 5 main categories and further sub-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:
 - Post-Industrial Families
 - Blue Collar Roots
- **Hard Pressed**, comprising of:
 - Struggling Families
 - Burdened Singles
 - High-Rise Hardship
 - Inner City Adversity

5.3 The database held 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 the numbers of contacts held in the second most affluent category – Urban Prosperity. These 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 or overseas. 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 visitor destinations within the UK are promoting themselves heavily in light of the economic downturn and the 'staycation'. As mentioned in the new Exeter Place Marketing Strategy, a weakness is its lack of a strong USP 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 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, linking Exeter regionally, nationally and internationally - Strategic location of Exeter within the West Country - Well regarded cultural venues (RAMM, Spacex and Exeter Phoenix) - Very strong heritage appeal (Cathedral, Underground Passages and other facilities) - 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 and Exmoor National Parks, Exe Estuary, RSPB reserves and the East Devon and Blackdown Hills Areas of Outstanding Natural Beauty) - High quality local food & drink - Award winning and Top 10 University - Michael Caines: local chef, recognised regionally and 	<p>WEAKNESSES 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 (cream teas & thatched cottages) - No readily identifiable iconic or internationally known building - Unpredictable weather patterns - Lack of a large scale festival in Exeter - Lack of large city centre theatre/concert venue - Traffic congestion at peak times - Majority of visitors to Exeter arrive by car <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
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<p>nationally</p> <ul style="list-style-type: none"> - Exeter Chiefs remain in the Premier League - Growth in German market due to city being a location for Rosamund Pilcher films <p>STRENGTHS....continued</p> <ul style="list-style-type: none"> - 30th anniversary of the RSPB's Avocet Exe Estuary Cruises in 2012 - Established business tourism sector <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>OPPORTUNITIES</p> <p>Visitor & product</p> <ul style="list-style-type: none"> - The re-opening and new exhibition programme at 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 - The opening of John Lewis - Further promotion of Exeter's heritage and cultural offering - Film tourism 	<p>THREATS</p> <p>Visitor & product</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 - Reduced visitor numbers to Exeter as a result of people holidaying elsewhere in the UK and overseas <p>Market conditions</p> <ul style="list-style-type: none"> - Economic growth reduces further - Rising oil / petrol prices making it more expensive to travel to the area - Rising costs facing businesses - On-going growth in competition from other UK destinations - Increase in Air Passenger Duty - Unforeseen external factors such as

- Tourism ambassadors introduced to champion Exeter regionally and nationally
- Foodie tourism breaks to Exeter and the Heart of Devon

Market conditions

- Heart of Devon Tourism Partnership, further national promotion of the area
- New route development at Exeter Airport

OPPORTUNITIES....continued

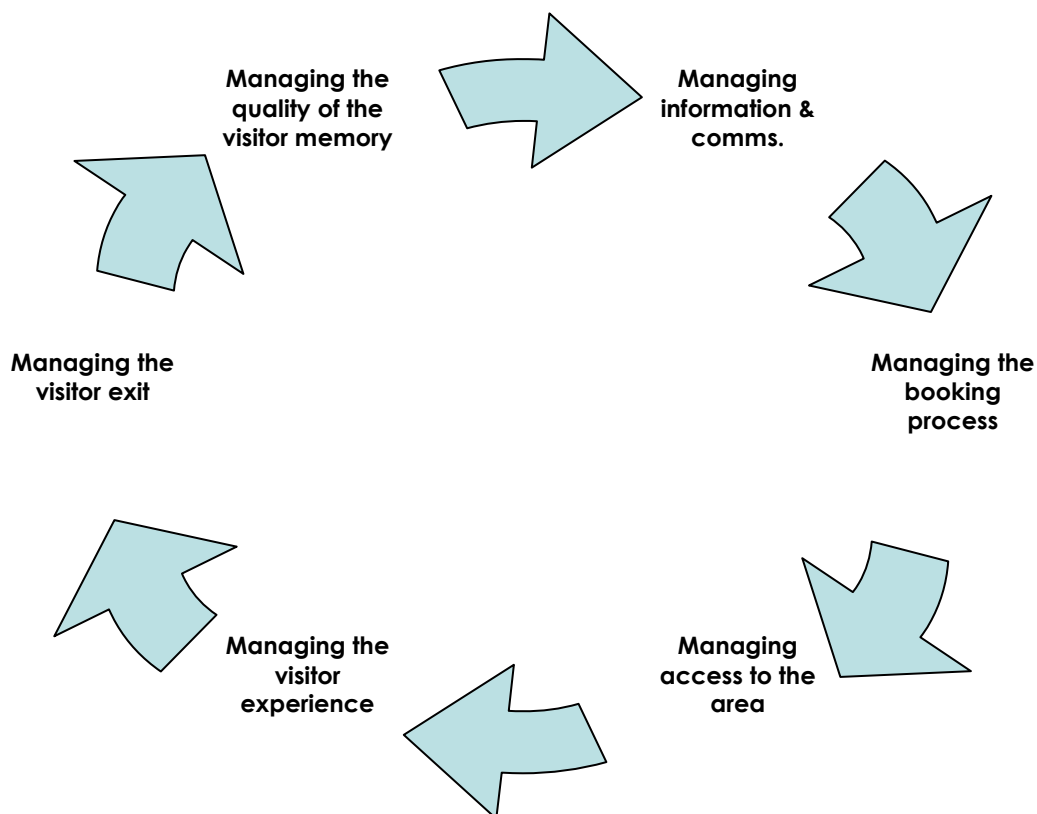
- Emerging markets continue to grow – Brazil, Russia, India and China
- Further growth in the staycation market
- Merging of Area Tourism Partnerships within Devon to reduce back office costs
- Growth in the national economy

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 © framework, which was researched and developed by LiveTourism, sets out 6 stages where a positive impact can be identified and made to enhance visitor experiences. 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 increase awareness of the destination and to improve access 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 used as an integral part of reviewing and ultimately improving the visitor experience within Exeter.



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 better understand customers needs and wants, for example:

- 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!

- online booking available on destination website;
- early booking incentives;
- accommodation establishments having online booking on their own websites;
- can a customer book through another sources, such as travel or booking agents.

7.7 **Managing access to the area – travel to the destination**

How easy is it 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, for example, through:

- working with public transport providers to and within the destination;
- using the results of 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, for example, through:

- improving visitor information in the destination;

- 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, for example, 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, for example, through:

- encouraging 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 use the internet on a regular basis. The internet is regarded as the main source of information for travel planning and booking. Some 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 and 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. Through the 2011 Exeter Tourist Information Centre visitor survey, 94% indicated that the overall impression of the centre was excellent or good.
- 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 provided on these proposals, or how the personal element of the service will be funded. To ensure Exeter Visitor Information & Tickets remains viable, it needs to continue to provide excellent customer service, information that customers require, keep costs to a minimum, keep pace with advances in technology and have high visibility.
- 8.8 Over the past couple of years pedestrian and highway signage has improved greatly to the Information Centre in Exeter, but 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 help 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. Negotiations have been ongoing with the Northcott Theatre regarding the Information Centre becoming a ticket agent. It was confirmed early December 2011 that the Information Centre is now a registered ticket agent for the Northcott Theatre. The Information Centre now sells tickets for the majority of cultural venues in the city.

8.11 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 safeguard 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 visitor expenditure by a minimum of 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 five 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 and 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, nationally and internationally

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 implementing the actions listed below will be reviewed annually to ensure they are contributing to achieving the five key priorities of the Strategy and are relevant and responsive to market conditions, opportunities and trends.

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				
REF	ACTION	PARTNERS	OUTCOMES / OUTPUTS	TIMESCALE
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.	Ongoing discussions
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 by public transport.	Year four
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.	Your four
1.4	Work with public transport providers to improve real time transport information at key points throughout the city	Stagecoach, First Dartline, Country Bus, First Great Western, South	Improved information on arrival times Improved customer service.	Year three

		West Trains, Cross Country, Exeter Airport, Flybe, DCC		
1.5	Work with Stagecoach to improve facilities for visiting coach drivers at Exeter Bus Station	Stagecoach Land Securities	An increase in coaches visiting Exeter due to improved facilities for drivers	Year five
1.6	Ensure that suitable visiting coach drop-off and overnight parking is incorporated in future city centre developments, taking into account the increase in visiting overseas coaches	Stagecoach City Centre Partnership appointed developers	Increase in groups visiting Exeter for day visits and overnight trips.	Ongoing discussions
1.7	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.	Year two
1.8	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.	Ongoing
1.9	Work with the University of Exeter and new hotel openings within Exeter to ensure each new 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 Exeter's offer as a visitor, conference and group destination.	As and when new facilities open

			Increase in visitors to the city.	
1.10	Work with tourism businesses to increase their long term financial sustainability by improving marketing, reducing costs, improving training and working in a joined up way	Sustainability SW HOSWLEP ECofC Exeter Business Support	Fewer businesses closures Reduced empty shops. Establish network of specialist business visitor support advisors	Year two
1.11	Work with Devon County Council and the HOSWLEP to develop and promote environmentally friendly ways of travelling to and around Dartmoor National Park, having Exeter as a Travel and Access Hub	DCC HOSWLEP Bike hire providers Attractions Accommodation Public transport	Increase the amount of people visiting Exeter for a sustainable day or overnight visit.	Year two
Priority 2 - Develop the visitor experience within Exeter to make the most of existing assets, individually and jointly and so that the sector provides year round jobs and contributes to a vibrant economy				
REF	ACTION	PARTNERS	OUTCOMES / OUTPUTS	TIMESCALE
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 Partnership City centre traders Quay traders	Increased resident and visitor awareness of the quarters within Exeter. Reduced complaints from visitors regarding finding places of interest	Year one
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 ECofC EVIT	Increase in the amount of coaches visiting, and staying longer. Increase in visitor numbers	Year two

		City centre attractions	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 & the Heart of Devon	Attractions, accommodation, eating out venues, transport providers	Increase in visitors who then stay longer and spend more within Exeter.	Ongoing
2.4	Undertake a comprehensive visitor survey in Exeter to understand the needs and concerns of our customers/visitors, and non-visitors, to help inform any future development of the visitor experience and promotion of the city	City Centre Partnership E&HODHRA City visitor attractions City eating out venues ECofC	Greater knowledge and understanding of the visitor needs and requirements informing actions to improve the visitor experience and promote repeat visits.	Year two
2.5	Work with existing heritage and cultural facilities within Exeter to improve the product and visitor experience, taking into account previous and planned research	Visitor attractions Cultural facilities	Increase in visitor numbers to Exeter and visitor facilities. Increase in customer satisfaction.	Year three
2.6	Investigate the potential for Exeter to enter the national Purple Flag scheme www.purpleflag.org.uk	City Centre Partnership City attractions retail and eating out venues	Exeter is promoted as a safe and clean place to visit for a night visit. Increase in the number of people visiting Exeter,	Year two

		Cleansing Car parks University of Exeter Exeter College ECofC	staying longer and increased spend.	
2.7	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 number of people using Exeter as a base for a walking holiday.	Year three
2.8	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.	Year three
2.9	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 	EVIT Land Securities Enjoy England Event venues	Increased awareness of EVIT. Increased visitor footfall and income. Increased bookings and repeat visiting.	Year one

	<ul style="list-style-type: none"> point(s) throughout the city • the use of volunteers within the Information Centre • the benefit of maintaining or increasing tickets sold within the Information Centre • increasing income streams 			
2.10	Develop existing visitor facilities that are less weather dependent 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.	Year two
2.11	Support, through promotion, a range of events and festivals that highlight or add to the cultural offering of Exeter	City centre events and event venues University of Exeter	Increase in event promotion, awareness and visitors to Exeter.	Year one
2.12	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 its 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 RSPB	Local environmental scheme supported and improved due to support from the Visitor Payback scheme	Year four
2.13	Work with the Red Coat Guide committee in improving the service offered to visitors and	Red Coat Guides	Increase in new and repeat visitors on guided tours.	Year one

	groups		Increase numbers of booked tours.	
2.1 4	Research the potential for alternative forms of delivery and management for Exeter's Underground Passages, reducing costs and improving its economic benefit as a visitor attraction	HODTP Other visitor facilities	Reduced costs and/or enhanced benefit to the visitor economy	Year one
2.1 5	Work with Tuckers Hall on the opening of their new visitor/interpretation facility	Tuckers Hall City Centre Manager	Increase the awareness of Tuckers Hall Increase in visitors	Year one
2.1 6	Work with existing visitor attractions in Exeter to ensure they understand and respond to the expectations of visitors and residents	Visitor attractions within the city	Improved customer service and visitor numbers at attractions. Time and money spent in the city increase.	Year two
2.1 7	Research attraction passes in other destinations throughout the UK and the potential of introducing a pass to Exeter	UK destinations City attractions	Increase in visitors to the city and attractions. Highlight lesser known attractions	

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

REF	ACTION	PARTNERS	OUTCOMES / OUTPUTS	TIMESCALE
3.1	Introduce Welcome to Exeter and Welcome to the Heart of Devon familiarisation visits for local tourism facilities and services, primarily	DCC SWTA Exeter College	Frontline members of staff have greater knowledge of Exeter & the Heart of Devon	Year one

	aimed at front line staff	ECofC	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, Welcome Host Gold and Welcome All	Exeter College SWTA	Increased customer service and repeat visitors to visitor attractions and Exeter.	Year one
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.	Year two
3.4	Investigate the provision of work trial, work experience within visitor facilities managed by Exeter City Council to raise skills and experience	University of Exeter Exeter College E&HODESB ECofC	Volunteers receive the relevant skills and experience to enable them to enter employment within the tourism industry.	Year three
3.5	Ensure that staff working within visitor facilities managed by the City Council are able to transfer skills and experience between facilities	EVIT Quay House Visitor Centre Underground Passages RAMM St Nicholas Priory Exeter Corn	Staff able to work in all centres managed by the City Council. Potential to reduce staffing budget and greater flexibility of operations. Improved customer service.	Year two

		Exchange		
3.6	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 City Centre Partnership	Business development and skills training plans for the tourism and food & drink sector. Increase in investment in the sector. Well run, quality businesses based in the city providing attractive employment opportunities.	Year four
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 area	Exeter Chamber of Commerce DCC HODTP HOSWLEP	LEP provides effective support for strategic infrastructure and other developments including access to development funding.	Ongoing
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 	E&HODESB Exeter College HOSWLEP DCC Exeter Chamber of Commerce	Improved 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.	Ongoing

	<ul style="list-style-type: none"> • 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 			
Priority 4 - Develop more effective and targeted visitor marketing of Exeter locally, regionally, nationally and internationally				
REF	ACTION	PARTNERS	OUTCOMES / OUTPUTS	TIMESCALE
4.1	Differentiate Exeter from other cities within the UK: <ul style="list-style-type: none"> • through further promotional activity • developing and promoting events that highlight the unique character of the city • highlighting nearby natural attractions, e.g. Exe Estuary and the Jurassic Coast 	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 and increases in visitor spend.	Year one
4.2	Work with the management team of the Royal Albert Memorial Museum to: <ul style="list-style-type: none"> • promote the newly opened visitor attraction, locally, regionally and nationally • develop short break packages with accommodation providers promoting national touring exhibitions • share expertise and resource in order to improve 'joined up' promotion of the Museum along with other visitor 	RAMM PR Agency Visit Devon Local press Local accommodation providers Heart of Devon	Substantial press publicity achieved regionally and nationwide. Increase in visitor numbers and spend to Exeter.	Year one

	<p>attractions and the city as a heritage and cultural destination</p> <ul style="list-style-type: none"> • promote the facility as a conference and meetings venue • promote the facility along with others 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 			
4.3	Promote Exeter through the use of social networking, viral marketing, smartphone apps and new technologies	Website hosting company City attractions, accommodation and event organisers	Increased awareness of Exeter to a younger audience. Increased numbers at visitor attractions and events and expenditure in the city.	Year two
4.4	Provide timely, accurate and efficient information on Exeter for visitors, online and through other media sources	City Centre Partnership HODTP	Increase in website hits to www.exetershopping.org Enhanced Exeter information available on various visitor websites. Increased awareness of Exeter, its attractions, places to stay and places to eat	Year two

			Increase in visitor numbers and spend.	
4.5	Work with Devon County Council on the promotion of the completed 'Exe Estuary Trail' - due for completion financial year 2013 – 2014	DCC HODTP Visit Devon Sustrans RSPB	Increase in people visiting the city and using the city as a base for cycling holidays.	Year four
4.6	Review and develop the brand for the promotion of Exeter to the visitor market, complimenting the Heart of Devon brand and securing support and use of the brand with the business community	HODTP City Centre Partnership Exeter Chamber of Commerce	Increase the awareness of Exeter. Increase in visitor numbers and spend to the city. Businesses throughout the city adopt the brand.	Year two
4.7	Translate key visitor publications, and or information, (available to download as PDF's) into German, Italian, Spanish, French, Russian, Dutch and Chinese	Twinning Associations University of Exeter	Overseas visitors visit more attractions within the city. Overseas visitors spend more time and money within the city.	Year one
4.8	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	Substantial regional and national promotion of Exeter. Increase in visitors to Exeter.	Year one

		Cleansing PR agency City Centre Partnership		
4.9	Re-design and re-launch the website www.exetershopping.org with an associated promotional campaign	City Centre Partnership 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.	Year one
4.1 0	Develop and implement a plan for the co-ordinated promotion of cultural and visitor attractions and venues (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 plan developed, agreed and supported. Increase in visitors and spend to the city. Increase in visitors to individual attractions.	Year one
4.1 1	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.	Year one
4.1 2	Work with public transport providers to develop a campaign to promote travel to Exeter: <ul style="list-style-type: none"> develop combined travel and 	First Great Western South West Trains Cross Country Trains Stagecoach	Increase in the number of people who visit Exeter by public transport. Transport provision	Year one

	<ul style="list-style-type: none"> attractions ticket • destination information on public transport websites • public transport information on destination website • bus and train station promotion of Exeter • using public transport as a visitor experience, such as the Avocet Line & Jurassic Coast bus 	First Flybe	improvement for the benefit of local people	
4.1 3	<p>Work with partners to promote Exeter and the Heart of Devon to key overseas destinations that offer the best return on investment:</p> <ul style="list-style-type: none"> • website development • overseas PR campaign • overseas exhibitions • publicity translated into key overseas languages • journalists visit 	Heart of Devon Visit Devon Visit England Exeter Airport Flybe local accommodation and attractions UK Trade & Investment English language schools	Increase the number of overseas visitors to Exeter.	Year one
4.1 4	Work with the University of Exeter Alumni to promote Exeter as a visitor destination	University of Exeter	Increase in the number of graduates visiting Exeter for a holiday or short break.	Year one
4.1 5	Work with Exeter's twinning organisations to promote Exeter as a place to visit	Rennes in France, Bad Homburg in Germany,	Increase the number of overseas visitors to Exeter from our twinning towns.	Year two

		Terracina in Italy, Yaroslavl in Russia, Exeter Twinning Circle		
4.1 6	Re-brand the Exeter self-guided heritage trails (Woollen, City Wall and Medieval) to become more user friendly – such as 'Historic Walk'		Increase in usage of routes.	Year one
4.1 7	Work with other key organisations to ensure that Exeter is seen as a 'film friendly' location.	City Centre Partnership ECofC Accommodation City facilities/venues	Increase in the amount of films and programmes that are filmed in the city.	Year three
4.1 8	Introduce tourism ambassadors for Exeter to ensure that the city is recognised as a vibrant cultural destination	PR agency Business leaders	Increase in press coverage for Exeter.	Year two
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				
REF	ACTION	PARTNERS	OUTCOMES / OUTPUTS	TIMESCALE
5.1	Work with the organisers of large scale events in the Heart of Devon (such as the Food & Drink, County Show, Folk and other Festivals) in the promotion of the event locally, regionally and nationally	Event organisers PR agency HODTP Visit Devon	Increase in visitors to events. Increase in visitors and spend to Exeter and the Heart of Devon. Increase in awareness of Heart of Devon regionally and nationally.	Ongoing

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.	Ongoing
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 HODTP 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.	Year one
5.4	Commission a regular visitor economic impact assessment for Exeter and Heart of Devon (STEAM, Cambridge or a suitable alternative)	Research company attractions Activity providers accommodation RSPB	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 	Year one

			<p>Devon</p> <ul style="list-style-type: none"> • where they spend their money • jobs supported by visitor spend 	
5.5	Work with Devon County Council, relevant Parish Council's and other bodies on the development and promotion of two new Jurassic Coast interpretation centres at Exmouth and Seaton	DCC Parish Councils HODTP members EDDC	<p>Two new interpretation centres open. 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.</p>	Year one
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 and the Heart of Devon businesses	TIC's along the Jurassic Coast HODTP members DCC Visit Devon Jurassic Coast team PR agency	<p>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.</p>	Year one

5.7	Establish a 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	HODTP 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. Visitor numbers to TIC's increase.	Year two
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	PR agency, HODTP Visit South Devon Dartmoor North Devon + Plymouth English Riviera Visit Devon PR agency Visit England HODTP members	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. Devon is featured in national magazines and newspapers.	Ongoing
5.9	Increase the online presence of Heart of Devon, and destinations within, within other official and non-official tourism websites	Visit Devon HODTP members PR agency	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	Year one

			on www.heartofdevon.com increase. Visitor numbers increase.	
5.1 0	Develop and implement a group marketing campaign promoting Exeter and the Heart of Devon to group organisers	HODTP group travel related members Visit Devon PR agency	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.	Ongoing
5.1 1	Develop and implement themed consumer marketing campaigns promoting Exeter and the Heart of Devon, taking into account previous research, targeting Secure Families, Flourishing Families, Affluent Greys and Educated Urbanites	HODTP 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	Year one
5.1 2	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 +	Increase in website hits to www.heartofdevon.com Increase in overseas visitors and spend to the Heart of Devon. Increase in visitor numbers to	Year one

		Plymouth English Riviera HODTP members	TIC's and attractions.	
5.1 3	Work with the Board of Directors of the Heart of Devon Tourism Partnership to ensure a sustainable financial footing for the Partnership	HODTP members HODTP board directors	Heart of Devon becomes more self financing to deliver marketing activity and membership benefits.	Ongoing
5.1 4	Develop an attractive range of membership benefits for new and existing members of Heart of Devon	HODTP members HODTP board directors Visit South Devon Dartmoor North Devon + Plymouth English Riviera Visit Devon	Membership to Heart of Devon grows by 20%. Increase in income to Heart of Devon to enable greater promotion and development activities to be increased.	Year one
5.1 5	Work with the 5 other Area Tourism Partnerships within Devon on joint projects to achieve economies of scale – for example: <ul style="list-style-type: none"> • PR • Website procurement • Advertising • Print • Photography • Business development 	Visit South Devon Dartmoor North Devon + Plymouth English Riviera Visit Devon HODTP members	Joint projects developed county wide to achieve economies of scale and operational effectiveness to the benefit of all ATP's within Devon, with the following investigated.	Ongoing
5.1 6	Promote the Heart of Devon through the use of social networking, viral marketing,	Website hosting company	Increased awareness of the Heart of Devon to a younger	Year one

	smartphone apps and new technologies	PR agency	audience. Increased attendance at visitor attractions and events within the Heart of Devon. Higher occupancy for Heart of Devon members.	
5.1 7	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 HODTP members	Accommodation inspection scheme is less confusing. Fewer complaints from visitors. Increase in the number of recognised quality businesses and thereby the image of the area and sector, within the minds of consumers.	Year one
5.1 8	Research and develop activity/adventure tourism to increase the awareness of what there is to see and do within the Heart of Devon	HODTP members Visit Devon Activity providers EDAONB BHAONB MDDC EDDC Jurassic Coast team	Increase in activity/adventure tourism to Heart of Devon. Information on activity/adventure tourism on www.visitdevon.co.uk and www.heartofdevon.com increases.	Year two

			Increase in visitors and spend to Heart of Devon.	
5.19	Commission a photographer to refresh the Exeter and Heart of Devon photographic library	Visit Devon EDAONB BHAONB Local attractions Local event organisers	Improved images of Exeter and the Heart of Devon raising the quality and effectiveness of promotional activity.	Ongoing
5.20	Work with the Red Coat Guide committee to investigate the potential to develop Green Coat and Blue Coat Guides for the countryside and coast, respectively	Red Coat Guides ECC Countryside Team Jurassic Coast RSPB Devon Wildlife Trust	Increased numbers of visitors coming to and staying in the area, particularly out of season.	Year three
5.21	Within all publicity material promote the national and internationally important natural sites within Exeter and the Heart of Devon, including the Exe Estuary, Jurassic Coast, East Devon Pebblebed Heaths, Seaton Marshes, Axmouth Undercliffs and the Blackdown Hills and East Devon AONB.	EDAONB BHAONB EDDC Jurassic Coast team RSPB Devon Wildlife Trust	Increased awareness of natural sites. Increase in visitor numbers. Increase in visitor spend.	Ongoing
5.22	Ensure that www.heartofdevon.com includes information on local churches and ancestral tourism	Church Tourism Association Exeter Cathedral Devon Record Office	Increase in the number of people visiting Exeter.	Year one
5.23	Work with conference and meeting venues in Exeter and the Heart of Devon to promote	University of Exeter Sandy Park	New website launched. Increase in the number of	Year one

	<p>the area as a business tourism destination, activity to include:</p> <ul style="list-style-type: none"> • Website development • Host journalists and buyers • Issue press releases • Attend buyer days • Direct mail 	<p>Public transport Conference, exhibition and meeting venues Visit Devon Meet England meetDevon HOSWLEP</p>	<p>meetings, exhibitions and conferences held in Exeter and the Heart of Devon. Increase in visitor number and spend.</p>	
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Abbreviations from action plan:

DCC	Devon County Council	MDDC	Mid Devon District Council
ED	Exeter City Council, Economic Development	EDDC	East Devon District Council
E&HODH	Exeter & the Heart of Devon Hotels & Restaurant	RAMM	Royal Albert Memorial Museum
RA	Association		
EVIT	Exeter Visitor Information & Tickets	HOSWLE	Heart of the South West Local Enterprise
		P	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&HODES	Exeter & the Heart of Devon Employment & Skills	ECofC	Exeter Chamber of Commerce
B	Board		

11.0 PERFORMANCE INDICATORS

11.1 The following are the current range of performance indicators. An early action will be to review these performance indicators to more specifically measure the outcome of the Visitor Strategy, improving services to customers and measuring economic impact. When available, data for 2011 will be used as the baseline for the Visitor Strategy.

Tourism related Performance Indicators	2005	2006	2007	2008	2009	2010
Number of visitors to Exeter Tourist Information Centre	87,995	72,899	74,800	106,234	79,618	76,530
Number of accommodation bookings made in Exeter Tourist Information Centre	758	648	615	428	413	430
Number of others users of Exeter 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 visitors to St Nicholas Priory – A Tudor Home	Closed	Closed	Closed	6,763 (Apr - Dec)	8,404	5,113
Number of visitors to Topsham Museum (Easter – Oct)	9,070	8,461	8,932	11,512	12,711	12,145
Number of group bookings made through the Tourism Unit	334	363	445	500	486	425
Number of unique visitors to City Council website	33,087	30,312	Not know	Not known	Not known	196,456 (May-Dec)

www.exeter.gov.uk/visiting						
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.					
Number of Exeter Park & Ride users	2005/06 1,162,953	2006/07 1,219,993	2007/08 1,326,193	2008/09 1,374,685	2009/10 1,364,493	2010/11 1,432,606
Number of inbound visitors to Exeter Airport	n/a	n/a	n/a	n/a	n/a	n/a
	This data is being collected from January 2012 onwards.					
Number of car park tickets sold in ECC car parks	2,745,149	2,606,467	2,857,885	2,471,346	2,483,278	2,364,835

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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, it's 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* – developing 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.

- 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 intended 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 the old county of Devon and Somerset 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 **Earnings:**

- 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 reductions in funding and staffing. The six Area Tourism Partnerships within Devon (Heart of Devon, North Devon +, English Riviera Tourism Company, Dartmoor Partnership, Visit Plymouth and Visit South Devon) along with Visit Devon, will continue to work collaboratively to promote Devon through complementary coordinated activity, 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 undertaken, in conjunction with a specialised search engine optimisation company, to increase the amount of website traffic to www.visitdevon.co.uk