

EXETER CITY COUNCIL**SCRUTINY COMMITTEE – ECONOMY
19 January 2012****EXECUTIVE
24 January 2012****EXETER VISITOR STRATEGY 2012 – 2016****1. PURPOSE**

- 1.1 To approve the final draft of the Exeter Visitor Strategy 2012 – 2016.

2. BACKGROUND

- 2.1 Members at Scrutiny Committee Economy on 8 September 2011 and Executive on 20 September 2011 received a report on the draft Visitor Strategy. The draft was agreed and subsequently distributed for consultation with key industry organisations, partners and agencies relevant to its delivery. The list of consultees is given within Appendix 1.
- 2.2 This Strategy has been developed with the 'Exeter Vision', proposed organisational changes, market trends and the current economic climate in mind. Implementation of this strategy is intended to bring 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.
- 2.3 Visitors to Exeter make a significant contribution to the local economy through their expenditure in supporting the development of new employment opportunities, improving and sustaining facilities used by residents, helping to increase the profile and positive image of the city and engendering local pride.
- 2.4 A full copy of the Exeter Visitor Strategy (Appendix 2) is available on the Council web site including the proposed Action Plan.

3. CONSULTATION

- 3.1 The draft Exeter Visitor Strategy was emailed and posted September 2011 to the list of consultees, with a deadline for comments and suggestions of 6 weeks. There was a chase up email and telephone call for outstanding responses in late October.
- 3.2 Responses received through the consultation process were generally very supportive of the overall approach of the Visitor Strategy and its proposed Action Plan. A summary of comments and suggestions received are included in table format in Appendix 3.
- 3.3 An Equality Impact Assessment (EQIA) has been completed on the Exeter Visitor Strategy and was presented to the Corporate Equalities Group in November 2011. The group was happy with the nature and types of groups consulted on the draft Visitor Strategy and the impacts listed on service users as a result of the Action Plan.

4. THE STRATEGY IN BRIEF

Aim

- 4.1 The aim of the 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 visitor expenditure by a minimum of 5% within the lifetime of the strategy”
 The following sections provide a summary of key aspects of the Strategy.
- 4.2 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. The level of development, which was highlighted in the previous Strategy has been high. Planned developments, as mentioned within section 4 of the Strategy, will maintain the momentum.
- 4.3 Exeter is seeing a period of high private sector investment which will benefit residents, local businesses and visitors to the city. These developments will allow Exeter to gain valuable local, regional and national media exposure and to be one step ahead of its competitors.
- 4.4 The re-opening of the Royal Albert Memorial Museum in December 2011, presented Exeter with a very 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.
- 4.5 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 growth at 0.7 per cent for 2012. This will certainly have a knock-on effect in terms of available disposable income and peoples’ holiday choices. Exeter needs to be alert to market conditions in its promotion as a place to take a day visit, short break, business trip or group visit.
- 4.6 Domestic tourism offers good growth potential for Exeter because:
- UK residents currently take significantly fewer ‘staycation’ holidays (UK holidays) than many other European countries;
 - uncertainty in the national economy and job market – people are more likely to take day visits and short break holidays in the UK;
 - recently announced 8% increase in Air Passenger Duty (APD) – may well discourage overseas travel;
 - 2012 Olympic and Paralympic Games – potential increase in overseas visitors and increase in people holidaying at home when the games are on.
- 4.7 The points raised in the previous sections provide the opportunity for proactive destinations to increase their share of the domestic and hopefully overseas markets. It is key that Exeter and the Heart of Devon markets itself as a desirable place for a domestic and overseas holiday for 2012 and beyond.

- 4.8 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 increasing the profile of Exeter as the regional capital of the South West. This will be primarily achieved through focused promotion of Exeter and the Heart of Devon.
- 4.9 The City Council will continue to work in partnership with tourism businesses, as well as Visit Devon and the other Area Tourism Partnerships in Devon – Visit South Devon, Dartmoor Partnership, English Riviera Tourism Company, North Devon + and Visit Plymouth to promote Devon and implement this strategy. The City Council will also continue to work closely with the surrounding area and recognise the important role other centres have in providing complementary cultural, leisure and sporting activities.

Strategic Priorities

- 4.10 The following five priorities, and subsequent action plan, have been developed to be implemented in partnership with the tourism and transport sector in the city, other units of the City Council, neighbouring local authorities, the Heart of Devon Tourism Partnership, Visit Devon and private investors:

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

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

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

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

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

- 4.11 A full copy of the final Exeter Visitor Strategy will be available on the Council's website and intranet to view and download.

5. PERFORMANCE MONITORING

- 5.1 The City Council aims to work hand in hand with its partners to increase employment and tourism (visitor income) activity within the city by 5% within the lifetime of the Exeter Visitor Strategy.
- 5.2 The Visitor Strategy will have a planned monitoring programme and will be reviewed every year to keep ahead of the changing visitor trends, completed capital developments, changes to tourism structures and the evolving national economy; as mentioned in the Strategy. The Exeter Tourism Forum comprising of a cross-section of businesses and organisations involved in or affected by

tourism will be re-established early 2012, to co-ordinate and gather information on how the industry is performing and monitor the issues it is facing.

- 5.3 In order to enable the Economy and Tourism Unit to measure trends a number of indicators have been developed, as shown in Appendix 4. Figures for 2010 have been provided and will be used as the baseline for the Strategy. Indicators will be monitored quarterly and reported to the City Council and its partners in delivering the Visitor Strategy.

6.0 FINANCIAL IMPLICATIONS

- 6.1 Council involvement and contribution in delivering the Exeter Visitor Strategy will be met within existing financial resources as summarised in the table below. Where considered necessary, further funding will be sought on a project-by-project basis by a bidding or application process in line with the priorities listed above.

Tourism Unit budget 2011 – 2012	Gross	Income	Net
Tourism Administration Staffing	£148,920	£0	£148,920
Tourism Marketing	£65,300	£0	£65,300
Exeter Visitor Information & Tickets	£184,530	£47,510	£137,020
Underground Passages	£151,490	£74,350	£77,140
Quay House Visitor Centre (funded by ECQT)	£59,180	£55,100	£4,080
Red Coat Guides	£20,790	£10,700	£10,090
	£630,210	£187,660	£442,550
Heart of Devon (external funding):	£89,000	£89,000	£0

- 6.2 The promotion of Exeter to the short break market will be met through resources from the Heart of Devon Tourism Partnership. Activities include website development and promotion (www.heartofdevon.com), producing the Heart of Devon Visitor Guide, public relations, themed promotional campaigns, consumer and trade e-newsletters, training and business support initiatives.

7.0 RECOMMENDED that

- 7.1 Scrutiny Committee support the adoption of the final draft of the Exeter Visitor Strategy 2012 – 2016; and
- 7.2 Executive approves the Exeter Visitor Strategy for the period 2012 – 2016.

RICHARD BALL
HEAD OF ECONOMY AND TOURISM

ECONOMY AND DEVELOPMENT DIRECTORATE

Local Government (Access to Information) Act 1985 (as amended)
Background papers used in compiling the report:

1. Draft “Exeter Visitor Strategy” – September 2011

APPENDIX 1

EXETER VISITOR STRATEGY 2012 – 2016

CONSULTEES

Full range of Exeter accommodation – hotels, B&B's, self catering, hostel and campus	Full range of Exeter visitor and cultural attractions
Heart of Devon Tourism Partnership Board	Heart of the South West Local Enterprise Partnership
Heart of Devon Tourism Partnership – Tourist Information Centres	Heart of Devon Tourism Partnership – 315 members
Dartmoor Partnership	North Devon +
Visit Plymouth	Jurassic Coast
South West Tourism Alliance	University of Exeter
Visit South Devon	English Riviera Tourism Company
Exeter Shopping Centres	Exeter City Football Club
Exeter Chiefs Rugby Club	Visit Devon
Independent tourism consultants	Exeter Chamber of Commerce
Devon County Council – Economic Development	Devon County Council – Sustainable Transport
Devon County Council – Cycling & Walking	Exe Estuary Partnership
Appointed PR Agency – A Head for PR	RSPB
Appointed design agency – The Marketing Department	Exeter & the Heart of Devon Hotels & Restaurants Association
Forestry Commission	Devon Wildlife Trust
Relevant ECC Units	Living Options
CEDA	Devon Youth Parliament
Age UK Exeter	Devon United Women
Multilingua Devon	Cultural Champions (Global Centre)
Racial Equalities Council	Equalities South West
Exeter Historic Buildings Trust	Sustrans
Federation of Small Businesses (Devon)	Sidmouth & District Hospitality Association
Exeter Community Transport Association	Stagecoach
Exeter International Airport	Flybe
Exeter & the Heart of Devon Hotels Association	

**EXETER VISITOR STRATEGY 2012 – 2016
SUMMARY OF CONSULTATION COMMENTS AND SUGGESTIONS**

Consultee	Comments / Suggestion	Response
University of Exeter	Business tourism not encompassed within the 5 priorities	Business tourism has been included within the Strategy and the action plan, detailing activity to be undertaken
	What is the value of business tourism to the city	Value of business tourism has been included in the Strategy
	The University would be a strong supporter of the Purple Flag	University of Exeter and Exeter College included as a partner
	Indicate how sustainable methods of travel will be promoted	Sustainable travel is featured more highly within the Strategy and action plan and will be included in all promotional material and campaigns
	The Strategy is heavily focused on RAMM, we presume a high proportion of budget will be focused on RAMM	RAMM have a specific budget to promote themselves. The Tourism Unit will promote RAMM and its opening in all relevant press releases, websites and printed guides
Multilingua Devon	Majority of complaints are regarding customer service	Customer care and Welcome to Exeter training courses will be developed and rolled out for all businesses across Exeter and the Heart of Devon
	More should be done to attract foreign tourists and students	Actions have been added to the Strategy detailing overseas promotional campaigns. Work will continue with the Language Schools promoting Exeter as a place to learn a second language

	Cost of public transport should be more affordable	Action has been added to the Strategy relating to joint ticketing for public transport and attraction entry
Heart of Devon Tourism Partnership – board director	There is no reference to international markets	Actions have been added to the Strategy detailing overseas promotional campaigns
	No reference to the tremendous array of activities in the area	Themed promotional campaigns listed in 5.11 in the action plan, will focus on promoting activity holidays
Heart of Devon Tourism Partnership – board director	Lack of reference to international markets	Actions have been added to the Strategy detailing overseas promotional campaigns
	Has ancestral tourism been considered	Information will be added to www.heartofdevon.com on ancestral tourism, but no specific marketing campaign
Exeter City Council staff	The Strategy aim details an increase in employment activity, is this likely with the constrained national economy?	With planned developments coming to fruition over the lifetime of the Strategy, this target should be reached
	Strategy focuses too much on retail	More information and actions have been added to the Strategy focusing on heritage and culture
	Joint marketing with University of Exeter and John Lewis	Discussions will take place with both organisations on promoting Exeter and its offer to their customers
	Work with websites to provide up to date and correct information on Exeter	Audit of external websites to ensure information on Exeter is relevant, correct and up to date
	How can we attract more conferences and meetings to Exeter	With developments coming to fruition during the lifetime of the Strategy, the up turn in the national economy there will be more business trips to Exeter

	The wildlife in and around Exeter is undervalued	Work will be developed with the RSPB and Devon Wildlife Trust to promote what is on Exeter's doorstep
	The Farmers Market does not have sufficient prominence in the city	The timings and location will be given more prominence
	Consider producing tourist information in Chinese due to the growth in Chinese students at the University of Exeter	Discussions will be held with the University to produce Welcome to Exeter in Chinese
	Limited mention of the Olympics	All 2012 promotional material (online and off-line) will feature the Torch Relay. Work is being undertaken on developing and promoting the Torch Relay
English Riviera Tourism Company	Need greater emphasis and development of all year round iconic international events and festivals	Previous reductions in the City Council budget do not allow for the development of international events
	Focus more on PR	The PR budget for Exeter and the Heart of Devon will be increased next year, due to large scale developments coming to fruition and competition from other destinations
	Concentrate on maximising marketing channels to reach as wide an audience as possible	www.heartofdevon.com will continue to be updated and developed to keep ahead of changes in visitor trends. Mobile website to be developed
	Develop mutually beneficial promotional partnership and become more commercial in your approach to marketing campaigns	Work will continue with Heart of Devon to develop 'affinity partners' to promote the area
Exeter & the Heart of Devon Employment & Skills Board	Work more with employment providers	Actions added to the Strategy on improving skills and experience for those in, and not in, employment
Exeter Phoenix	The role that the evening economy plays in attracting visitors is not given enough credit	Further information added to the Strategy on the night time economy, so that its not

		just focused on eating out
	The Strategy should make a clear distinction between the three types of visitors to Exeter – day, overnight and holiday maker	A marketing campaign promoting Exeter and the Heart of Devon will be produced detailing the different types of visitors to the area and taking into account the visitor journey as stated in the Strategy
A Head for PR	It is important to work with some of the leading as well as some of the newly developed tourism businesses in the area	PR will be a key feature for 2012 onwards in highlighting newly opened businesses and developments within Exeter and the Heart of Devon
	You are missing the face of Exeter	The Tourism Unit will work with business leaders to appoint a tourism ambassador for Exeter and the Heart of Devon
Mazzard Farm	More cross functional co-operation to build events so they benefit the whole area	With limited funding available this will be difficult to achieve
	Are we fully exploiting the position the University of Exeter has	Further information and actions have been added to the Strategy regarding working with the University and the Alumni
	Are we fully exploiting 'foodie breaks'	Themed promotional campaigns as listed in 5.11 in the action plan, will focus on promoting food and drink in Exeter and the Heart of Devon
Devon County Council	More could be made of the Exe Estuary Trail to encourage city centre visits and overnight stays	As part of the proposed marketing plan for Exeter, work will be undertaken to promote Exeter for day visits, arriving into the city by bike
Independent tourism consultant	Good customer service is critical	Customer care and 'Welcome' course will be rolled out for front line members of staff
	Good research on visitors, but no indication of non-visitor research	Due to limited budgets, planned research will focus on known visitors and warm leads (people who have previously requested information on the area)

	Don't discount Torbay's 1.4 million staying visitors	A meeting will be arranged with the English Riviera Tourism Company to establish links and projects between Torbay and Exeter
South West Water	Could you work with the Exeter University Alumni	Information and action has been added to the Strategy relating to promoting Exeter to the Alumni database
	Given the good rail links to Exeter, has bike hire been considered to help people see more of Exeter by bike	A bid has recently been submitted by Devon County Council to develop and promote environmentally friendly ways of travelling around Dartmoor National Park, having Exeter as a Travel and Access Hub. The City Council will work with DCC and providers in developing and promoting this project
Exeter Cathedral	Lack of information on Exeter Cathedral in the Strategy	Information and actions have been added to the Strategy relating to Exeter Cathedral and the important role it plays in the city
RSPB	Exeter is strategically placed to be a centre for ecotourism	Information will be added to www.heartofdevon.com This will be specifically looked at when developing themed promotional campaigns
	New developments include new family hide and trail, and visitor facilities associated with the Exe Estuary Trail	New developments have been included within the Strategy and will be promoted once completed
Sidmouth & District Hospitality Association	Need to look at attractions within the winter period – Christmas market	Meeting arranged for early 2012 to discuss the potential to introduce a Christmas market in Exeter
	Increase out of season promotions	Themed promotional campaigns developed, as mentioned in 5.11 of the action plan. A focus will be on out of season promotion

	Need more brand awareness	PR will play a key role in building brand awareness, budgets have been increased for 2012 and beyond
Jurassic Coast	World Heritage Sites, surely this has to be a significant selling point for Exeter	Within promotional campaigns, the Jurassic Coast will be featured more highly
	I couldn't find much mention of increasing the sustainability of businesses	Action (1.10) added to the Strategy relating to securing the long term financial sustainability of businesses
Sustainability South West	93% of visitors arrive by car to Exeter, this causes concern due to pressure on budgets and high fuel prices	Information and actions added to the Strategy relating to working with public transport providers

EXETER VISITOR STRATEGY 2012 – 2016

Tourism Performance Indicators to be used a baseline for monitoring purposes

	2010
Number of visitors to Exeter Tourist Information Centre	76,530
Number of accommodation bookings made in Exeter Tourist Information Centre	430
Number of other users of Exeter Tourist Information Centre (tel, fax & email)	40,719
Number of visitors on a Red Coat Guided Tour	15,221
Number of visitors to the Quay House Visitor Centre	23,579
Number of visitors to the Underground Passages	19,517
Number of visitors to RAMM	Closed
Number of visitors to Exeter Cathedral	108,869
Number of visitors to St Nicholas Priory – A Tudor Home	5,113
Number of visitors to Topsham Museum (Easter – Oct)	12,145
Number of group bookings made through the Tourism Unit	425
Number of unique visitors to City Council website www.exeter.gov.uk/visiting	196,456
Number of unique visitors to Tourism Partnership website www.heartofdevon.com	145,049
Number of accommodation bookings made through tourism website (start collecting data 2011)	New PI
Value of accommodation bookings made through tourism website (start collecting data 2011)	New PI
Number of Exeter Park & Ride users (2010/11)	1,432,606
Number of inbound visitors to Exeter Airport	New PI
Number of car park tickets sold in ECC car parks	2,364,835