

EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY 17 JANUARY 2013

UPDATE ON THE EXETER VISITOR STRATEGY 2012 – 2016

1.0 PURPOSE

- 1.1 The purpose of this report is to update members on progress with implementation of the Exeter Visitor Strategy 2012 – 2016.

2.0 BACKGROUND

- 2.1 Executive approved the Exeter Visitor Strategy 2012 – 2016 on 24 January 2012 following comment and support from Scrutiny Committee – Economy during the drafting and completion phase.
- 2.2 The aim of the Visitor 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”.
- 2.3 The focus of the Strategy is on sustaining and creating quality jobs within the tourism sector and increasing the profile of Exeter as a vibrant cultural destination, night and day. The appeal of the city has increased since the adoption of the Exeter Visitor Strategy through the opening of John Lewis and the Magdalen Chapter Hotel, the holding of the first Exeter Christmas Market, improvements to city centre public realm and the continued success of the Royal Albert Memorial Museum since re-opening in December 2011. The proposed future development of the bus station site will further improve the appeal of the city to the short break, day visitor and group markets.
- 2.4 Actions from the Exeter Visitor Strategy form part of the Tourism Unit's annual work programme, to ensure delivery is met through the agreed timeframe.
- 2.5 Tourism to the city was worth just over £182.4 million in 2011 the most recent comprehensive figures available, which supports an estimated 4,200+ jobs, covering the sectors below. The information below was gathered from the Cambridge Economic Activity model, which shows the value of visitor spend as the latest available figures only released late 2013.

	2006	2007	2008	2009	2010	2011
Type of spend	£ million	£ million	£ million	£ million	£ million	£ million
Accommodation	£24.8	£26.9	£25.8	£25.1	£28.9	£34.1
Shopping	£46.2	£47.1	£49.2	£47.6	£47.2	£50.8
Food & Drink	£43.0	£44.8	£45.7	£44.6	£46.3	£49.7
Attractions & Ent.	£16.1	£17.1	£16.8	£16.4	£16.4	£18.5
Travel	£17.1	£18.4	£18.0	£17.5	£19.2	£21.2
Visiting Friends & Relatives	£10.3	£11.3	£9.4	£8.5	£7.7	£8.0
TOTAL	£157.4	£165.6	£164.9	£159.7	£166.2	£182.4
Total estimated Jobs (supported by spend)	3,616	4,004	4,111	3,767	3,898	4,255

3.0 PROGRESS TO DATE

3.1 The following five priorities were agreed in the Strategy, to be implemented in partnership with the tourism business community in the city and the Heart of Devon Tourism Partnership.

3.1.1 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

3.1.2 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

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

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

3.1.5 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

3.2 An overview of outputs and progress made during 2012 is listed in Appendix 1 under each priority heading. A benchmark set of indicators for measuring progress was set out and based on 2011 figures, which can be seen in Appendix 2.

4.0 HEART OF DEVON TOURISM PARTNERSHIP

4.1 Realising the tourism potential of the city goes hand in hand with exploiting opportunities presented within Exeter and the wider area. The key is to have a concerted effort to minimise duplication and where possible, pool resources and maximise promotion through an integrated approach. Work has continued to develop the Heart of Devon Tourism Partnership, which broadly covers the areas of Exeter, East Devon, Mid Devon and Teignbridge.

- 4.2 Board meetings of the Tourism Partnership occur every two months and discuss current and future planned activities, along with joint projects to be undertaken with Visit Devon and other Area Tourism Partnerships within Devon. Work undertaken by the Heart of Devon Tourism Partnership, current and planned, includes:
- continued website development and promotion (www.heartofdevon.com)
 - business support activities
 - work with Visit Devon on the promotion of Devon nationally and internationally
 - press and public relations, and journalist visits
 - national advertising of destination, visitor guide and website
 - brochure production, distribution and fulfilment
 - visitor and business e-newsletters
 - attend national exhibitions to promote the area to the group market
 - development of themed promotional campaigns
 - recruitment of tourism related businesses within the area to the membership scheme
 - marketing and social media training for members
- 4.3 Over the past 12 months Heart of Devon have been working with two local companies, A Head for PR and Thinkology to promote the area regionally and nationally as set out above, primarily to families, people who have retired and young couples.
- 4.4 As of December 2012, membership to Heart of Devon stands at 303 businesses, which includes mainly attractions and accommodation providers based within Exeter, East Devon, Mid Devon and Teignbridge. The membership scheme is being reviewed for April 2012, to coincide with the beginning of the new membership year. It is the ambition of the Tourism Partnership to grow the membership base by another 100 businesses by recruiting additional food & drink, activity and retail organisations.
- 4.5 The Heart of Devon Tourism Partnership will build on work achieved during 2012 and previous years, to promote the area as an affordable destination for families and couples wanting a short break or longer holiday. To help with this, work will continue to develop and promote www.heartofdevon.com, work with regional and national press and trade to further inform them of Exeter and the Heart of Devon and themed campaigns will be researched, developed and implemented.
- 4.6 Within the Exeter Visitor Strategy, there are actions to promote the area to regional and national group organisers, ensuring that Exeter and the Heart of Devon is included in their itineraries.

5.0 CURRENT ECONOMIC CLIMATE

- 5.1 Initially, the economic downturn was predicted to have had a positive effect on the domestic tourism market, but this has been slow to develop, especially

within regional cities. There is still concern within the UK population over the economy and job security, which will more than likely have an impact on spending behaviour within the travel and tourism sector.

- 5.2 The Olympic Games and Diamond Jubilee were widely enjoyed by the UK population, but domestic holiday trips were down 7% year on year Jan – July 2012, with 1-3 night breaks down by 5% and a 12% decline in breaks of more than 4 nights. Not good news for UK domestic tourism.
- 5.3 The motivators for holidaying in England are positive – to return to a place liked, go somewhere new, liking England, and the ease v's going abroad. But there are indications of increased levels of disappointment with holidaying at home such as the continued poor weather which contributes to an increased wish to go abroad year on year. The poor weather during summer 2012 caused 16% of people who were due to holiday at home to change their booking.
- 5.4 The fall out from the financial crisis and the impact on global demand continues. In addition, severe constraints in domestic spending power, and weak demand accompanied by stagnant productivity means the national economy has barely grown since 2010.
- 5.5 In mid 2012 the UK economy fell back into recession (double-dip) and some commentators have suggested that in the near future a third spell in recession is possible. Low growth is forecast until 2015; the growth forecast for 2013 is a very modest 1%.

6.0 PERFORMANCE MONITORING

- 6.1 A set of key performance indicators were included in the Visitor Strategy as a basis for monitoring trends and the effectiveness of the actions, which are listed within Appendix 2. Figures for 2011 are taken as the baseline for the Exeter Visitor Strategy 2012 – 2016.
- 6.2 Facilities managed by the Tourism Unit have seen a variation of increases and decreases over the years. This is attributed to changes in visitor booking patterns, the national economic climate and better promotion of a number of facilities.
- 6.3 The total number of people visiting Exeter Visitor Information & Tickets (EVIT) and the amount of accommodation bookings made through EVIT has fallen, in line with national trends. This is mainly the result of an increase in the usage of the internet and mobile phones, and people booking online before their visit to the area. The centre continues to be used by those wishing to visit the city, and once in the city, to receive information on what there is to see and do and make their stay as enjoyable and stress free as possible. The centre is also heavily used by residents of Exeter to gain information on events within the city, find information on where to take visiting family and friends; and to book for various venues and events.
- 6.4 Exeter Visitor Information & Tickets opening hours were reduced April 2010 as a budget saving for the City Council. The reduced opening hours have had an impact on the number of people using the centre, but not significantly.
- 6.5 The 'Cambridge Economic Impact Model' is commissioned every year to estimate the volume and value of tourism to the South West economy. Data

is then extracted for the sub-regions, including Exeter. The model draws down data from the annual United Kingdom Tourism Survey for domestic visitors, the International Passenger Survey and the England Leisure Day Visits Survey.

- 6.6 From the most recent Cambridge Economic Impact Model (2011), which can be seen in Appendix 3, it is estimated that tourism is worth in the region of £182.4 million annually to the Exeter economy, an increase of 9.75% from 2010. Some 4,200+ jobs are supported within hotels, attractions, cultural venues, eating out venues and transport facilities within the city representing an increase of more than 10%.
- 6.7 The main points arising from comparisons from 2010 to 2011 include:
- total actual jobs supported by tourism spend has increased by 11.56%;
 - spend from day visitors has increased by 0.13%;
 - day visitor trips increased by 11.11%
 - spend from overnight stays has increased by 19.48%;
 - overnight trips increased by 2.49%
 - visits to friends and relatives has increased by 21.95%;
 - total tourism spend has increased by 9.75%.
- 6.8 The Cambridge Economic Impact Model is a useful indicator of trends, but the absolute figures are the results of a model not comprehensive information. With the re-opening of the Royal Albert Memorial Museum and the opening of John Lewis, visitor volume and value figures for 2012 should continue with the rise as experienced in 2011, although the impact of the continuing difficult conditions is likely to have had an adverse effect.

7.0 PRIORITIES FOR 2013 – 2014

- 7.1 The focus for 2013 – 2014 will be on delivering outstanding actions from the Exeter Visitor Strategy, developing the Heart of Devon Tourism Partnership and paying particular emphasis on the promotion of the city in light of the challenging national economic climate. These are broken down into the four strategy priority areas as follows:

- 7.1.1 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
- 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;
 - Work with tourism businesses to increase their long term financial sustainability by improving marketing, reducing costs, improving training and working in a collaborative way;
 - Work with Devon County Council and the Local enterprise Partnership to develop and promote environmentally friendly ways of travelling to and around Dartmoor National Park, having Exeter as a travel and access hub.

7.1.2 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

- Investigate the potential to introduce 'meet & greet' ambassadors for day visiting coaches, guiding visitors to the Information Centre, attractions, shops and eating out venues;
- 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;
- 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;
- Work with existing visitor attractions in Exeter to ensure they understand and respond to the expectations of visitors and residents;
- Research joint multi-attraction passes in other destinations throughout the UK and the potential of introducing a joint pass to Exeter.

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

- Develop a short training programme for taxi companies and their drivers to be ambassadors for the city;
- Ensure that staff working within visitor facilities managed by the City Council are able to transfer skills and experience between facilities.

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

- Promote Exeter through the use of social networking, viral marketing, smartphone apps and new technologies;
- Provide timely, accurate and efficient information on Exeter for visitors, online and through other media sources;
- 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;
- Work with Exeter's twinning organisations to promote Exeter as a place to visit;
- Introduce tourism ambassadors for Exeter to ensure that the city is recognised as a vibrant cultural destination.

7.1.5 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

- 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;
- Research and develop activity/adventure tourism to increase the awareness of what there is to see and do within the Heart of Devon.

7.3 The above actions will be delivered through the annual Tourism Unit budget and the resources of the Heart of Devon Tourism Partnership, as shown below.

8.0 FINANCIAL IMPLICATIONS

8.1 City Council involvement and contribution towards delivering the Exeter Visitor Strategy has been met from within existing financial resources as summarised in the table below.

Tourism Unit Budget 2013-14	Net
Tourism Administration	£151,880
Tourism Marketing	£63,890
Exeter Visitor Information & Tickets	£142,230
Exeter's Underground Passages	£84,580
Quay House Visitor Centre (funded by ECQT)	£52,860
Red Coat Guides	£8,850
Heart of Devon Tourism Partnership (external)	£80,000
Total	£584,290

8.2 The budget for the next year is generally as above, unless there are any budget changes resulting from the budget setting process

9.0 RECOMMENDED that:

9.1 Members note the progress made with implementing the Exeter Visitor Strategy 2012 – 2016 and support the actions proposed to be undertaken during 2013 – 2014.

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

Background papers used in compiling the report:

1. Report to Scrutiny Committee - Economy 19 January 2012

APPENDIX 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

Action	Progress	Output
Help to deliver sustainable mixed use development in Exeter through the production of a master plan for the development of Exeter Bus Station	Planning application anticipated 2013.	N/A
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	Discussions held with Planning on suitable relocation of coach drop off and parking.	N/A
Work with visitor related businesses relocating or opening in Exeter to ensure they receive media exposure locally, regionally and nationally	Park & Ride promotional campaign implemented for the opening of John Lewis.	40% increase in use of P&R for opening weekend of John Lewis. 6% increase in car park tickets sold, Nov 2012 compared to Nov 2011.
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	Worked with Magdalen Chapter Hotel to ensure national coverage. Worked with the University of Exeter on the promotion of the opening of the Forum building.	Exeter and hotel featured in Sunday Telegraph, the Guardian, The Times newspaper, Wallpaper, Stylist, Sleeper, foodiepedia.co.uk and numerous trade publications.

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

Action	Progress	Output
Work with the City Development Department to ensure the interpretation, signage and experience of the city's quarters is informative, engaging and accessible	Tourism Unit consulted regarding new interactive panels.	Installation of 3 interactive monoliths due March 2013 – located outside John Lewis, Bedford Square and St Thomas Railway Station.
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	Different images and editorial used to promote Exeter and the Heart of Devon. Encouraged businesses to apply for local and national tourism awards.	RAMM, St Nicholas Priory and Underground Passages receive Visitor Attraction Quality Assurance Scheme (VAQAS). Red Coat Guides, Quay House Visitor Centre and Self Guides Heritage Trails receive 'Places of Interest Award (PIQAS). RAMM wins Museum of the Year 2012 & Devon Visitor Attraction of the Year 2012. Exeter Farmers Market wins silver in the Taste of the West SW Flavour Award for Farmers' Market of the year 2012.
Review and develop Exeter Visitor Information & Tickets in light of reduced budgets, to include investigating: <ul style="list-style-type: none"> • having shared use within the Information Centre with a suitable tourism related business • having attended mobile information point(s) around the city • having unattended visitor information point(s) throughout the city • the use of volunteers within the Information Centre • the benefit of maintaining or increasing tickets sold within the Information Centre 	Review of Exeter Visitor Information and Tickets will take place Jan 2013 onwards.	Anticipate outputs from ensuring approach to meeting customer demands are cost efficient and effective in providing information to attract visitors and their expenditure with local businesses.

<ul style="list-style-type: none"> • increasing income streams 		
<p>Support, through promotion, a range of events and festivals that highlight or add to the cultural offering of Exeter</p>	<p>60,000 copies of Winter in the City and 150,000 copies of Summer in the City produced annually to promote events and festivals. Christmas campaign developed with Express & Echo. Events promoted through www.heartofdevon.com and www.ExploreExeter.co.uk plus the Heart of Devon Twitter and Facebook account.</p>	<p>91% increase in unique website hits to www.heartofdevon.com in Nov 2011 compared to Nov 2012. 11% increase in unique website hits to www.heartofdevon.com for the previous 12 months as a whole.</p>
<p>Work with the Red Coat Guide committee in improving the service offered to visitors and groups</p>	<p>14 new volunteers recruited, due to complete training in April 2013. Improved the Halloween tour but poor visitor turnout, due to severe rain and wind on the evening.</p>	<p>One new tour planned by the Red Coat Guides for 2013 season, to add to the 16 tours already offered.</p>
<p>Work with Tuckers Hall on the opening of their new visitor/interpretation facility</p>	<p>Advice and support given to management committee. Facility featured in city tourist publications.</p>	<p>Tuckers Hall opened spring 2012.</p>

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

Action	Progress	Output
Introduce Welcome to Exeter and Welcome to the Heart of Devon familiarisation visits for local tourism facilities and services, primarily aimed at front line staff	New Welcome to Exeter course developed with Exeter College.	Welcome to Exeter rolled out to industry from April 2013 onwards.
Ensure that all Tourism Unit frontline members of staff have been trained in Welcome Host, Welcome Host Plus, Welcome Host Gold and Welcome All	All tourism staff trained in courses.	Improved customer service within facilities.
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	Food & Drink promotional campaign researched and developed, due to be rolled out Jan - Apr 2013.	26 local businesses taking part in Cream Tea Trail and competition. Winner announced at Exeter Food Festival in April 2013.
<p>Work with the Exeter & the Heart of Devon Employment & Skills Board (ESB):</p> <ul style="list-style-type: none"> • to ensure new hospitality businesses are supported through the recruitment of new staff and ongoing staff development • to help existing hospitality businesses recruit significant numbers of new staff, through either expansion or the opening of a new season • to assist tourism businesses to set up and support apprenticeships • to bid for funding to support and help deliver leadership and management training for hospitality businesses 	<p>ESB have worked with Hampton by Hilton Hotel at Exeter Airport to streamline access to employment, training and up-skill local residents to meet recruitment needs.</p> <p>Get Devon Working campaign ran for 6 months through 2012, aiming to support and encourage businesses to recruit young people, promoting the benefits of work experience, apprenticeship and graduate internship schemes.</p> <p>New award for young people launches Jan 2013 to develop core employability skills to prepare them for the needs of the labour market. Award to be piloted with 100 students from January 2013.</p>	<p>Recruitment open event attended by over 100 job seekers, many of which received pre-interview support through Jobcentre Plus.</p> <p>20 "Skills Maps" have been produced in key employment sectors – including Hospitality, Retail and Customer Service. 6 sector-focused case studies produced, including 1 for the hospitality sector accessed by employers to increase take-up of apprenticeships and increase opportunities for local job seekers.</p>

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

Action	Progress	Output
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 	Press Release issued on Exeter in terms of tourism investment and development to show investment in times of austerity. Main city events promoted in Heart of Devon Visitors Guide and Visit Devon events guide.	PR featured on 4,000 group organisers printed. 80,000 visitor guide printed. 120,000 Visit Devon events guide printed.
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 attractions and the city as a heritage and cultural destination • 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 	RAMM included in all relevant city publicity, websites and press releases. RAMM added to group organisers booking form and Groups Guide. RAMM added to www.heartofdevon.com/conferences to promote venue for meetings and conferences. ECC run heritage attractions feature in RAMM, Underground Passages, Red Coat Guide, Historic Quayside and Topsham leaflets.	347,934 visitors since reopening in December 2011. ??? meetings held at RAMM since reopening. 115 school bookings made at RAMM since reopening.
Translate key visitor publications, and or information, (available to download as PDF's) into German, Italian,	Explore Exeter guide translated into languages listed in action. German guide	Translated guides downloaded from www.exeter.gov.uk Sept – Dec 2012:

Spanish, French, Russian, Dutch and Chinese	taken to Bad Homburg for town twinning event. All translated guides available to download from www.exeter.gov.uk	11 French & German 11 German 9 Spanish 5 Russian 3 Dutch 2 Italian 1 Chinese 2,000 German guides printed and distributed in Bad Homburg at a twinning event.
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	City and quayside events held May 2012.	Exeter featured on national TV, radio and newspapers. 8,000 tickets supplied and distributed for Cathedral Green event. An estimated 50,000 people attended the event across five sites in Exeter.
Re-design and re-launch the website www.exetershopping.org with an associated promotional campaign	New website launched October 2012 – www.ExploreExeter.co.uk covering Exeter and Topsham. Website used for main call to action for Express & Echo Christmas campaign.	Website stats for 17 Oct – 10 Dec: Unique visitors- 2,232 Page views- 8,709 Average time on website- 2 mins and 26 secs - Most popular page- “What’s on”
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	Campaign to be implemented with the launch of the new Exeter Cultural Strategy in Summer 2013.	N/A
Audit regional and national tourism websites covering information on Exeter to ensure data is up to date and covers all visitor facilities	Work continues on researching and searching tourism websites referring to Exeter and updating incorrect information.	Websites updated: Visit England Visit South West
Work with public transport providers to develop a campaign to promote travel to Exeter: <ul style="list-style-type: none"> develop combined travel and attractions ticket 	Great Days Out campaign developed with South West Trains to promote Exeter for day visits along their route – to be	Public transport information uploaded onto www.heartofdevon.com and www.ExploreExeter.co.uk

<ul style="list-style-type: none"> • 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 	<p>launched 2013. Exeter literature is now displayed within Exeter Bus Station. Agreement sought with FGW on displaying Exeter images within Exeter Central Train Station.</p>	
<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 	<p>Explore Exeter guide translated in 7 languages and available to download from www.exeter.gov.uk and www.heartofdevon.com</p>	<p>Attended celebratory event in Bad Homburg to promote Exeter. 7 American journalists hosted Nov 2012. 1 Canadian journalist hosted Apr 2012.</p>
<p>Work with the University of Exeter Alumni to promote Exeter as a visitor destination</p>	<p>Work will start Jan 2013 with the University of Exeter to promote facilities in Exeter for the Exeter Alumni Reunion in July 2013.</p>	<p>N/A</p>
<p>Re-brand the Exeter self-guided heritage trails (Woollen, City Wall and Medieval) to become more user friendly – such as 'Historic Walk'</p>	<p>Re-brand will take place once supplies of leaflets have run low, due to take place summer 2013.</p>	<p>N/A</p>

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

Action	Progress	Output
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	Large events promoted within Heart of Devon website, Visitors and Group Organisers Guide and Visit Devon annual events guide. Events promoted through appointed PR agency.	4,000 group organisers printed. 80,000 visitor guide printed. 120,000 Visit Devon events guide printed. Large scale Heart of Devon events sent to 15 journalist requests. The first Exeter Christmas Market held 23 Nov to 16 Dec.
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	Heart of Devon logo and website link sent to all new and renewing members.	Exeter Christmas Market cabin branded Heart of Devon. Heart of Devon brand incorporated into tourism website www.ExploreExeter.co.uk Heart of Devon brand incorporated into new Topsham leaflet
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	"A Head for PR" appointed to deliver PR campaign and journalists visits to Exeter and the Heart of Devon.	12 official Heart of Devon Press Releases sent covering Apr – Dec 2012. 5 journalist hosted 104 journalists requests responded to through Travmedia
Commission a regular visitor economic impact assessment for Exeter and Heart of Devon (STEAM, Cambridge or a suitable alternative)	Cambridge Model commissioned May 2012 for 2011 data, for the local authority areas within the Heart of Devon.	2011 report received Nov 2012, showing 9% increase in visitor trips and spend to Exeter.
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	Promotion of both Jurassic Coast Centres will commence once build is completed.	N/A
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	Jurassic Coast pages on www.heartofdevon.com updated and refreshed.	N/A

consequential benefit for Exeter and the Heart of Devon businesses	Jurassic Coast to be featured in activity campaign for winter 2013.	
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	National campaigns not signed up to, due to match funding being required (approx. £100k).	N/A
Increase the online presence of Heart of Devon, and destinations within, within other official and non-official tourism websites	New portal website developed www.VisitDevon.co.uk to include more links to www.heartofdevon.com	www.visitdevon.co.uk is the top referring website for www.heartofdevon.com 1,279 referrals for Nov 2012.
Develop and implement a group marketing campaign promoting Exeter and the Heart of Devon to group organisers	4,000 copies of the 2012/13 Heart of Devon Group Organisers printed. 2,500 copies sent direct to group organisers. Attending Excursions (London) and the South West Group Travel Fair (Yeovil), both held in January 2013 to promote Heart of Devon for group holidays.	40% increase in group bookings, 2011 compared to 2010. 73 contacts received at Excursions 2011 17 contacts collected at the South West Group Travel Fair 2011. 5 Press Release's sent to national group magazine and newspapers. All 5 featured.
Develop and implement themed consumer marketing campaigns promoting Exeter and the Heart of Devon, taking into account previous research which identified specific target groups - Secure Families, Flourishing Families, Affluent Greys and Educated Urbanites	Summer holiday campaign developed for summer 2012, aimed at families. 'Whatever the Weather' campaign implemented for summer 2012, due to severe weather. Exeter Christmas campaign developed with the Express & Echo.	3,030 page views for Whatever the Weather pages on website. Website stats for 17 Oct – 10 Dec www.ExploreExeter.co.uk : Unique visitors- 2,232 Page views- 8,709 Average time on website- 2 mins and 26 secs - Most popular page- "What's on"
Work with Visit Devon, Visit Cornwall and the 5 other Area Tourism Partnerships within Devon to promote the West Country overseas	Work with Visit England, Visit Cornwall and Visit Devon to encourage journalists to visit Devon.	7 American journalists hosted Nov 2012. 1 Canadian journalist hosted Apr 2012.
Work with the Board of Directors of the Heart of Devon Tourism Partnership to ensure a sustainable financial footing	Regular board meetings held to discuss future options for Heart of Devon.	Income targets achieved for year.

for the Partnership		
Develop an attractive range of membership benefits for new and existing members of Heart of Devon	Membership scheme and benefits will be reviewed March 2013, for roll out April, the beginning of a new membership year.	N/A
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"> • Press Release and relations • Website procurement • Advertising • Print • Photography • Business development 	A Head for PR appointed to administer Press Releases for Visit Devon. New website launched September 2012 www.visitdevon.co.uk New Devon events Guide being drafted, due to be printed Feb 2013.	11 Press Release's issued since April 2012 www.visitdevon.co.uk website stats, Sep – Dec 2012 compared to same period in 2011: Visits up 3.23% to 194,556 Unique visitors up 3.90% to 164,694. 120,000 copies of new Devon events guide to be printed and distributed throughout the South West Feb 2013 onwards.
Promote the Heart of Devon through the use of social networking, viral marketing, smartphone apps and new technologies	Regular tweets and posts on Heart of Devon social media accounts. Currently investigating the use of apps and mobile websites.	2,838 Twitter followers and 395 Facebook followers as of Dec 2012.
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	Accommodation inspection scheme to be reviewed March 2013, for roll out April.	N/A
Commission a photographer to refresh the Exeter and Heart of Devon photographic library	Tony Cobley commissioned for summer 2012.	100 pictures received for promotional use for Exeter and also Topsham, Exmouth, Sidmouth, Axminster, Honiton and Tiverton.
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	Information will be included in the next edition of the Heart of Devon Visitor Guide 2012 and Group Organiser Guide 2013/14.	Information has been uploaded onto www.heartofdevon.com

Undercliffs and the Blackdown Hills and East Devon AONB.		
Ensure that www.heartofdevon.com includes information on local churches and ancestral tourism	Historical churches within the Heart of Devon researched and copy written.	Information on churches added to www.heartofdevon.com August 2012.
<p>Work with conference and meeting venues in Exeter and the Heart of Devon to promote 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 	Members with conference facilities added to www.heartofdevon.com/conferences Working with www.meetDevon.co.uk to promote Heart of Devon for conferences and meetings.	Attended Confex Spring 2012, exhibition to promote conference venues. 6 venues from the Heart of Devon attended.

APPENDIX 2

Tourism Performance Indicators

Tourism related Performance Indicators	2005	2006	2007	2008	2009	2010	2011	% + / - from 2005	% + / - from 2010
Number of visitors to Exeter Visitor Information and Tickets	87,995	72,899	74,800	106,234	79,618	76,530	66,645	-24.65%	-12.95%
Comment:	The fall in visitors to EVIT is due to a number of reasons, but particularly with visitors sourcing their own information, booking accommodation and tickets pre-arrival via the internet, the increased use of mobile phones and other devices and reduced opening hours. It is understood the throughput increased figure for 2008 is due to the opening of Princesshay.								
Number of accommodation bookings made in person at Exeter Visitor Information and Tickets	758	648	615	428	413	430	227	-70.05%	-47.21%
Comment:	As above.								
Number of other users of Exeter Visitor Information and Tickets (tel, letter & email)	23,082	28,817	26,924	40,471	44,445	40,719	23,933	+3.69%	-41.22%
Comment:	The amount of people contacting EVIT by phone, letter and email has continued to grow, until 2011, which saw a decline. This was primarily due to the problems with the telephone system not recording calls, this has been resolved with a new telephone system.								
Number of visitors on a Red Coat Guided Tour	12,912	14,617	18,114	17,204	16,125	15,221	14,985	+16%	-1.55%
Comment:	The Red Coat Guides are dependant on good weather and due to us having a number of bad summers visitor figures have shown a decline. 2008 was the 20 th anniversary of the Red Coat Guides.								
Number of visitors to the Quay House Visitor Centre	23,471	26,048	24,561	26,123	25,060	23,579	25,039	+6.68%	+6.19%
Comment:	The same as above, due to continuous bad weather during the summer visitors to the Quay fluctuate each year. The refurbishment and new signage for the Quay House Visitor Centre has helped raise the awareness of the visitor attraction on the Quayside and boost visitor figures.								
Number of visitors to the Underground Passages	18,459	Closed	4,753	19,863	18,896	19,517	20,554	+11.35%	+5.31%
Comment:	2011 has been the best performing year for the Underground Passages. This is attributed to continued promotion of the visitor attraction and better pedestrian signage on Paris Street.								

Number of visitors to RAMM	233,408	247,000	192,025	Closed	Closed	Closed	32,574 (door) 285,673 (out n about)	N/A	
Comment:	2012 will be the first full year of opening for RAMM. Visitor figures, as of early December, for 2012 are 344,442.								
Number of visitors to Exeter Cathedral	187,000	142,000	170,000	131,741	109,778	108,869	110,783	-40%	+1.76%
Comment:	During 2008 Exeter Cathedral introduced an admission charge, previously visitor numbers were estimated. Since an admission charge was introduced, visitor figures have remained steady and have actually increased by 0.92%.								
Number of visitors to St Nicholas Priory – A Tudor Home	Closed	Closed	Closed	6,763 (Apr - Dec)	8,404	5,113	4,762	-29.59%	-6.86%
Comment:	Compared to the first year of opening in 2008, visits to St Nicholas Priory have declined by 29%. During 2008 there were many free events funded by HLF and were a requirement of the capital grant for the refurbishment and redisplay. Also an education team ran schools sessions, as RAMM was closed, many of our children's activities took place in the Priory.								
Number of visitors to Topsham Museum (Easter – Oct)	9,070	8,461	8,932	11,512	12,711	12,145	11,441	+26.14%	-5.80%
Comment:	A new Topsham leaflet was introduced 2008 to assist with the promotion of the town and museum. 2011 saw a 5% decline in visitor numbers compared to the previous year, this is attributed to the adverse weather resulting in less people visiting Topsham.								
Number of group bookings made through the Tourism Unit	334	363	445	500	486	425	597	+78.74	+40.47%
Comment:	Promotion of the area to the group market continues to show positive results, with the amount of groups visiting Exeter.								
Number of unique visitors to City Council website www.exeter.gov.uk/visiting	33,087	30,312	Not know	Not known	Not known	196,456 (May-Dec)	223,033	+574%	+13.53%
Comment:	Unique visitors to the tourism pages on the City Council website continues to grow, it is one of the most popular section of the website. The website pages are continually refreshed and updated.								
Number of unique visitors to Tourism Partnership website www.heartofdevon.com	24,107	25,596	40,108	39,406	102,547	119,442	143,099	+493%	+19.81%
Comment:	Unique visitors to www.heartofdevon.com have grown year on year since it launched. This is primarily down to frequent updates, relevant information on the website and continued work on implementing keywords and phrases on the homepage.								

Number of inbound visitors to Exeter Airport			1,012,000						
Comment:	Awaiting date from Flybe								
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	2011/12 1,264,581	+8.74%	-11.73%
Comment:	Exeter Park & Ride showed a steady increase up to the financial year 2010/11, the decline for is partially attributed to the downturn in the economy with less people using the service.								
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	2,322,630	-15.39%	-1.78%
Comment:	Exeter's car parking figures fluctuate year on year, the overall decline is attributed to the downturn in the economy with less people parking in the City.								

The number and value of accommodation bookings made through our tourism website were part of the original performance indicators. The live accommodation booking facility went live early 2011, but we came across numerous difficulties with accommodation venues reluctant to upload 'live' availability. This initiative will be suspended until the technology allows.

APPENDIX 3**Economic impact of tourism within Exeter**

	2009	2010	2011
Direct actual jobs	2,882	2,958	3,201
Indirect actual jobs	884	856	1,054
TOTAL ACTUAL JOBS	3,767	3,814	4,225
Bed spaces	6,703	7,401	7,625
Day visits	1,568,000	1,539,000	1,710,000
Day visitor expenditure	£79.5 million	£77.4 million	£77.5 million
Overnight trips	360,000	442,000	453,000
Overnight expenditure	£71.6 million	£81.1 million	£96.9 million
Visits to friends & relatives	193,000	164,000	200,000
Other tourism expenditure	£8.6 million	£7.7 million	£8.0 million
TOTAL VISITOR TRIPS	1,928,000	1,981,000	2,163,000
TOTAL VISITOR EXPENDITURE	£159.7 million	£166.2 million	£182.4 million

Cambridge Economic Activity Model