

**EXETER CITY COUNCIL**  
**SCRUTINY COMMITTEE – ECONOMY**

**6 MARCH 2014**

**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 implementing the Exeter Visitor Strategy 2012 – 2016.

**2.0 BACKGROUND**

- 2.1 Executive approved the Exeter Visitor Strategy 2012 – 2016 in January 2012 following wide spread consultation with the tourism and hospitality industry in and around Exeter. 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 for short break holidays and day visits.

- 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 Year on year the appeal of the city increases. Since adoption of the strategy a number of new developments and refurbishments have been completed including John Lewis, Magdalen Chapter Hotel, 2 Premier Inn hotels, University of Exeter developments, Quay Climbing Centre, Haven Banks Outdoor Educational Centre, Tuckers Hall, Central Train Station improvements, numerous restaurant and shop openings.

Future developments at the bus station site, IKEA, further hotel openings, Exeter Cathedral, Sandy Park, launch of the Exe Estuary Trail and Exeter being a Host City for the Rugby World Cup in 2015 will further improve the appeal of the city to the short break and day visitor market.

The location of the city in Devon and the huge value of that brand together with the undoubted attraction of the internationally renowned coast and countryside make it inseparable from its surroundings.

- 2.4 In 2012 there were just over 2.2 million visitor trips to Exeter, who spent £195.6 million in the local economy, the most recent comprehensive figures available, which supports an estimated 4,800+ jobs within the sectors below. The information below was gathered from the Cambridge Economic Activity model and sets out spend within sectors relevant to the visitor economy within the City. As agreed at Scrutiny Committee Economy in January 2012, data for 2011 will be used as the baseline for the Exeter Visitor Strategy.

<b>Exeter</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>Type of spend</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>
Accommodation	£24.8	£26.9	£25.8	£25.1	£28.9	£34.1	£40.7
Shopping	£46.2	£47.1	£49.2	£47.6	£47.2	£44.1	£50.7
Food & Drink	£43.0	£44.8	£45.7	£44.6	£46.3	£44.1	£50.6
Attractions & Ent.	£16.1	£17.1	£16.8	£16.4	£16.4	£17.0	£20.4
Travel	£17.1	£18.4	£18.0	£17.5	£19.2	£19.9	£24.1
Visiting Friends & Relatives, boats, second homes	£10.3	£11.3	£9.4	£8.5	£7.7	£8.0	£9.1
<b>TOTAL</b>	<b>£157.4</b>	<b>£165.6</b>	<b>£164.9</b>	<b>£159.7</b>	<b>£166.2</b>	<b>£167.3</b>	<b>£195.6</b>
Total estimated Jobs (supported by spend)	3,616	4,004	4,111	3,767	3,898	3,947	4,822
Overnight trips	383,000	392,000	369,000	360,000	442,000	453,000	445,000
Day visitor trips	1,580,000	1,576,000	1,611,000	1,568,000	1,539,000	1,688,000	1,818,000

- 2.5 The figures for neighbouring districts show much larger numbers of people visiting the wider area who need to be attracted into the city. The reduction in overnight stays emphasises the importance to promote Exeter and highlight the city more as a short break destination within Heart of Devon and not rely too heavily on neighbouring areas. But it is still important to continue to work effectively with the wider area to support Exeter's economy.

In the wider area in 2012 of East Devon, Mid Devon and Teignbridge, the visitor economy had recovered to be worth just over £649.2 million, supporting over 17,000 jobs in the area as shown in the table below.

<b>East Devon, Mid Devon &amp; Teignbridge</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>Type of spend</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>	<b>£ million</b>
Accommodation	£114.9	£94.9	£112.3	£91.6	£92.5	£105.3
Shopping	£136.4	£80.9	£142.1	£134.7	£130.2	£139.4
Food & Drink	£173.6	£166.4	£182.1	£173.1	£190.3	£205.7
Attractions & Ent.	£63.2	£57.9	£64.9	£59.1	£67.4	£71.8
Travel	£83.4	£75.7	£84.9	£78.5	£87.6	£98.4
Visiting Friends & Relatives, boats, second homes	£32.7	£28.1	£25.8	£24.1	£23.8	£28.6
<b>TOTAL</b>	<b>£604.2</b>	<b>£503.9</b>	<b>£612.1</b>	<b>£558.1</b>	<b>£591.8</b>	<b>£649.2</b>
Total estimated Jobs (supported by spend)	16,583	15,124	16,192	14,800	15,145	17,377
Overnight trips	1,588,300	1,351,700	1,559,000	1,300,300	1,338,000	1,353,000
Day visitor trips	5,974,000	5,995,000	6,328,000	6,437,899	9,247,000	9,745,000

### 3.0 PROGRESS TO DATE

- 3.1 The following five priorities of the strategy were agreed 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 progress and outputs achieved made during 2013, against the priorities, is listed in Appendix 1.

#### **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 which make up the tourism attraction to visitors. It has always been recognised that the key is to have a concerted effort to minimise duplication and where possible, pool resources and maximise promotion through an integrated approach.

4.2 Neighbouring local authorities contribute to visitor promotion in a variety of ways, Teignbridge choosing to financially support another Area Tourism Partnership covering South Devon, and East Devon not supporting any local promotional activity. As the City Council supports other activities which contribute to the visitor experience the neighbouring districts choose to fund the development and management of the product offering, such as maintaining the public rights of way network, beach management and visitor facilities.

4.3 As mentioned within this report, Exeter has secured approval to be one of the Host Cities for the Rugby World Cup 2015 – a once in a lifetime opportunity for the city. All promotion through England Rugby, the IRB and Visit England will be about promoting Exeter as a Host City. Exeter needs to embrace Host City status and proactively promote this, locally, regionally and internationally to increase visitor trips and spend and inward investment into the city.

4.4 As ever it is important to ensure that promotional work undertaken through the Heart of Devon Tourism Partnership gives due prominence to the name Exeter and that it is featured highly within all marketing material, including - press releases, printed guides, e-newsletters, themed campaigns and on the website. Therefore it is proposed to change the name of the Tourism Partnership to Exeter and the Heart of Devon.

The Tourism Partnership will continue to promote the city, coast and country offering within all marketing materials, but with more of a focus on the cultural and heritage offering provided in Exeter.

4.5 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. Under the proposal to be more Exeter focused and change the name of the Tourism Partnership, the company and board of director structure would continue, but it is intended that it will include a wider range of board directors that have an interest in the city.

- 4.6 As mentioned in 2.3 there have been numerous developments within and surrounding the city. Compared to a few years ago, there is more on offer to keep people in Exeter for a weekend short break.

A particular aim of the Tourism Partnership will be to promote the area for a cultural short break holiday both regionally and nationally (and internationally where appropriate) to increase this aspect of the market.

- 4.7 As of January 2014, membership of the Partnership stands at 240 businesses, which mainly includes attractions and accommodation providers based within Exeter, East Devon, Mid Devon and Teignbridge contributing collectively to direct promotional activities through their membership fees. The table below shows the breakdown of where a member is located within the Tourism Partnership.

	Direct membership	Membership through an association	Total
Exeter	44	20	64
East Devon	56	43	99
Mid Devon	36	4	40
Teignbridge	19	3	22
Outside of the area	7	8	15
<b>Total</b>	<b>162</b>	<b>78</b>	<b>240</b>

- 4.8 The membership scheme is being revised for April 2014, to coincide with the beginning of the new membership year. An experienced sales person is being employed to grow the membership base by another 100 businesses (minimum) by recruiting additional food & drink, activity and retail organisations in and around the city.
- 4.9 The contract to manage media relations and online marketing on behalf of the Tourism Partnership was put out to a number of local organisations during 2013 and was won by Astley Media and Rokk Media respectively. The Tourism Partnership is working with both companies to improve marketing material produced, especially in the run up to the Rugby World Cup 2015.
- 4.10 The Tourism Partnership along with Rokk Media and Astley Media are working on a 3 year marketing plan to promote the area as a modern, vibrant cultural destination. They are building on work achieved during previous years, to promote the area as an affordable destination for families and couples wanting a short break or longer holiday. More importantly building links with Exeter Chiefs in the run up to the Rugby World Cup 2015.
- 4.11 Over the previous 12 months the Tourism Partnership has undertaken a number of promotional activities to promote the area for short breaks, long holidays and group visits, including:
- Developed and managed a Cream Tea Competition and Trail throughout the Heart of Devon, with the winner (Real Food Exeter) selling their award winning cream tea at the Exeter Festival of South West Food & Drink
  - Implemented Halloween campaign in association with the Exeter Chiefs, based around events and places to visit in the area
  - Developed a new membership scheme and pricing structure
  - Carried out ongoing monthly proactive and reactive media work
  - Distributed ongoing bi-monthly e-newsletter to visitor database (45k+)
  - Built a new conference website for the area, due to go live in February 2014

- Updated content, images and improved search engine optimisation on [www.heartofdevon.com](http://www.heartofdevon.com)
- Implemented the new Visit Devon approved accommodation inspection scheme, replacing the Heart of Devon scheme to promote a quality experience
- Participated in the Visit Devon 'Get Active in Devon' national online campaign
- Contributed to Visit Devon PR activity and the new Visit Devon Official blog to support promotion of the Devon brand

## 5.0 CURRENT ECONOMIC CLIMATE

5.1 The economic downturn has led to a massive change in holiday behaviour and attitudes, surprisingly with leisure time becoming ever more important even as finances are stretched. Those that have changed their usual behaviour pattern to take more domestic trips are overwhelmingly positive about their experience, with destinations like Exeter and Devon benefitting from this change. As the economy recovers from the recession it is vital to continue to provide inspiration and ideas through proactive marketing material and activity to build on the attraction towards taking domestic breaks formed in recent years.

From research undertaken by Visit England, most people have not seen any tangible sign of the domestic economy improving in terms of the level of domestic income. However, four sets of intensions are emerging:

- People are returning to taking longer holidays abroad
- Keeping the short break habit with holidays in England an important option, but short trips abroad are becoming more readily considered
- People are continuing to take holidays and breaks in England
- There is further interest in discovering more of England

To counter this, the industry and destinations such as Exeter, need to continue to provide ideas for holidaying in England and play on individual destination strengths such as the quality of accommodation and local food and drink; and the experience offered in the destination.

5.2 There are a number of opportunities in both the short and long term to shape future trends and opportunities. The areas in which, based on the analysis, investment is likely to generate the greatest rewards from the visitor economy are:

- **Investment in infrastructure:** For instance, improving transport infrastructure – road, rail, sea and air
- **Continued support for the sector:** To leverage opportunities such as the use of digital technologies, understand and exploit target markets and respond to changes in legislation.
- **Continued targeted marketing effort:** There is an opportunity to tailor destination offering to attract visitors from established economies, but also from emerging economies. However, the majority of England's visitors will continue to come from traditional markets in the developed world.

5.3 In November 2013, the Bank of England published its quarterly Inflation Report. The report provides an overview of the current economic picture and it allows the bank to share its reasons for the decisions it takes. The report states that there are signs that the economy is starting to recover, driven by improving credit conditions and lifting economic uncertainty. There is however, a long way to go before the aftermath of the financial crisis has cleared and economic conditions normalise.

## **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 implemented, which are listed within Appendix 2. Figures for 2011 are taken as the baseline for the Exeter Visitor Strategy 2012 – 2016.
- 6.2 Visitor facilities managed by the Economy Department 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 '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.
- 6.4 From the most recent Cambridge Economic Impact Model (2012), which can be seen in Appendix 3, it is estimated that tourism is worth in the region of £195.6 million annually to the Exeter economy, an increase of 16.92% from 2011, which is well above the original target of 5% during the lifetime of the Exeter Visitor Strategy. Some 4,800+ jobs are supported within hotels, attractions, cultural venues, eating out venues and transport facilities within the city representing an increase of more than 22%. The Cambridge Economic Impact Model is a useful indicator of trends, but the absolute figures are the results of a model not comprehensive information.
- 6.5 The main points arising from comparisons from 2011 to 2012 include:
- total actual jobs supported by tourism spend has increased by 22.17% to 4,822
  - spend from day visitors has increased by 7.38% to £66.9m
  - day visitor trips increased by 7.7% to 1.8m
  - spend from overnight stays increased by 23.45% to £119.6m
  - overnight trips decreased by 1.77% to 445,000
  - total tourism spend has increased by 16.92% to £195.6m

A press releases and media pack is being launched to highlight the value of the visitor economy in Exeter. Work will continue to improve these figures year on year through working with the Tourism Partnership and promoting Exeter as a vibrant, modern cultural short break destination.

## **7.0 PRIORITIES FOR 2014 – 2015**

- 7.1 The focus for 2014 – 2015 will be on delivering outstanding actions from the Exeter Visitor Strategy, developing the Exeter and the Heart of Devon Tourism Partnership and paying particular emphasis on the promotion of the city in the run up to the Rugby World Cup 2015. Actions from the Exeter Visitor Strategy form part of the Economy & Tourism Unit's annual work programme, to ensure delivery is met through the agreed timeframe. 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:

- Help to deliver sustainable mixed use development in Exeter through the production of a master plan for the development of Exeter Bus Station
- 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
- Work with visitor related businesses relocating or opening in Exeter to ensure they receive media exposure locally, regionally and nationally
- Work with public transport providers to improve real time transport information at key points throughout the city

**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:

- Promote the concept of quality as an attraction to visitors and in terms of the image of the city, to tourism businesses within Exeter and the Heart of Devon
- Work with existing heritage and cultural facilities within Exeter to improve the product and visitor experience, taking into account previous and planned research
- 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
- Work with Devon County Council on improvements to the national tourist brown signs scheme currently being reviewed by central government
- Research attraction passes in other destinations throughout the UK and the potential of introducing a 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:

- Ensure that there is strong support for the local tourism and food & drink sector within the Heart of the South West Local Enterprise Partnership
- Work with the Exeter & the Heart of Devon Employment & Skills Board:
  - 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
- Investigate the provision of work trial, work experience within visitor facilities managed by Exeter City Council to raise skills and experience

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

- Work with other key organisations to ensure that Exeter is seen as a 'film friendly' location
- Promote Exeter & the Heart of Devon as a vibrant cultural short break destination, highlighting the City, Coast and Country offer

**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:

- Work with the organisers of large scale events in Exeter and the Heart of Devon (such as the Food & Drink, County Show, Folk, RWC2015 and other Festivals) in the promotion of the event locally, regionally and nationally
- Support and encourage the implementation of the Exeter & the Heart of Devon brand throughout Exeter and the rest of the Heart of Devon to build

the profile of the brand in the marketplace

- 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
- Develop and implement a group marketing campaign promoting Exeter and the Heart of Devon to group organisers
- Work with the Board of Directors of Exeter & the Heart of Devon Tourism Partnership to ensure a sustainable financial footing for the Partnership
- Work with the 5 other Area Tourism Partnerships within Devon on joint projects to achieve economies of scale – for example:
  - PR / Website procurement / Advertising / Print / Photography / Business development
- Commission a photographer to refresh the Exeter & the Heart of Devon photographic library
- Within all publicity material promote the national and internationally important natural sites within Exeter & 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.
- 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
- Work with neighbouring destinations and local authorities to develop a Destination Management Plan to be recognised as a Destination Management Organisation

7.3 The above actions will be delivered through the Economy & Tourism Unit budget and staffing and the resources of the Exeter and 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 will be met from within existing financial resources as summarised in the table below.

<b>Tourism Unit Budget 2013 – 2014</b>	<b>Net</b>
Tourism Administration (staff and central re-charges)	£149,700
Tourism Marketing	£58,360
Heart of Devon Tourism Partnership (projected income)	£29,500
<b>Total</b>	<b>£237,560</b>

8.2 The budget for 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 comment on the progress made with implementing the Exeter Visitor Strategy 2012 – 2016 and support the actions proposed to be undertaken during 2014 – 2015.
- 9.2 The Tourism Partnership is asked to change its name to Exeter and the Heart of Devon in order to give due prominence to the city in promotional activity and with Exeter being a Host City for the Rugby World Cup 2015.

**VICTORIA HATFIELD**  
**ECONOMY & TOURISM MANAGER**

**RICHARD BALL**  
**ASSISTANT DIRECTOR ECONOMY**

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

## 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	Ongoing discussions with developer and City Council. Planning application expected autumn 2014.	Ongoing.
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	Ongoing discussions with Exeter City Council's City Development and Car Parking, as well as Devon County Council and Stagecoach to ensure suitable provision is made available within the city.	Provision for coach pick up and drop off has been made on Belgrave Road. Coach parking to be discussed with City Council Car Parking service.
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 participated in a national Welcome Airport project, supported by VisitEngland, Visit Kent Ltd, VisitBritain, People 1st (incorporating Go Skills), and the Airport Operators Association. 15 airports across England undertook a 'Welcome Audit and Improvement Plan' process, which reviews the visitor's journey throughout the airport from booking, to arrival and departure	Improvement Plan for Exeter Airport produced and implemented by the airport. Toolkit to be used for welcome audits at other public transport gateway locations in Exeter for implementation by the start of RWC2015.
Work with tourism businesses to increase their long term financial sustainability by improving marketing, reducing costs, improving training and working in a collaborative way	Training courses provided by external company to assist businesses with online marketing activity.	Two courses held within the Heart of Devon: Social media and proactive marketing, 9 attended course which was held Jan 2014. Managing your reputation online, 10 booked on course to be held Mar 2014.
Work with Devon County Council and the Local Enterprise Partnership to develop and promote environmentally friendly	Work continues with Devon County Council on developing a suitable cycle	Brompton Dock bike hire installed at Exeter St David's train station.

ways of travelling to and around Dartmoor National Park, having Exeter as a travel and access hub	route from Exeter up to Haldon Forest and Dartmoor.	Exeter Central train station redevelopment completed, with space for a bike hub available for commercial use.
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**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	Three new interactive monoliths installed at Princesshay, Sidwell Street and Cowick Street with real time public transport information autumn 2014. Inputted visitor related information to the database that runs the touch screen.	Investigating alternative sources of income to replace out of date information.
Investigate the potential to introduce 'meet & greet' ambassadors for day visiting coaches, guiding visitors to the information centre, attractions, shops and eating out venues	Work will progress on this action during 2014, linking with work undertaken in the volunteer programme for the RWC2015 and the development of the Red Coat Guides service.	Rolled forward to 2014 – 15.
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	Participating in a county wide visitor survey with the five other Area Tourism Partnerships in Devon. Results of the survey will inform the Exeter Marketing Strategy.	Visitor survey signed off by all 6 Area Tourism Partnerships in Devon. Visitor Survey sent to customer database of 140,000 - February 2014. Results of survey available - April 2014.
Investigate the potential for Exeter to enter the national Purple Flag scheme <a href="http://www.purpleflag.org.uk">www.purpleflag.org.uk</a>	City Centre Partnership to aim for Purple Flag status by the start of the RWC2015.	To be rolled forward by City Centre Partnership
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	Ongoing programme of events held within visitor facilities across the city, both city council and commercially run in and out of peak season. Limited budget available for product development.	Ongoing event development and promotion.

Work with existing visitor attractions in Exeter to ensure they understand and respond to the expectations of visitors and residents	Annual visitor surveys completed in Quay House Visitor Centre, Red Coat Guides, Exeter's Underground Passages and Visitor Information Centre to determine visitor satisfaction levels and areas for improvement.	The customer survey from attractions managed by the City Council, they rated the overall impression as excellent: Underground Passages – 64% Visitor Information Centre – 53% Quay House Visitor Centre – 71% Red Coat Guide – 79% Results of the survey have informed how and where we market some of the facilities locally and regionally.
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**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;

Action	Progress	Output
Develop a short training programme for taxi companies and their drivers to be ambassadors for the city	Work will progress on this action during 2014, linking with work undertaken in the ambassador and volunteer programme for the RWC2015.	Rolled forward to 2014 – 15.
Ensure that staff working within visitor facilities managed by the City Council are able to transfer skills and experience between facilities	Staff working within the Quay House Visitor Centre, Exeter's Underground Passages and Visitor Information Centre, work in alternative sites that are not their regular place of work.	Greater product knowledge on the city. Able to cross sell other visitor facilities. A flexible workforce enabled to step in at short notice.

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

Action	Progress	Output
Promote Exeter through the use of social networking, viral marketing, smartphone apps and new technologies	Existing Heart of Devon Twitter and Facebook account progressing well with lots of user engagement. New Google+ account set up. Video released dressing up 3 Chiefs	Heart of Devon Twitter account followers have increased by 101% to 6,570 in the previous 12 months and Facebook likes have increased by 57% to 644. Exeter Chiefs Halloween video shared

	<p>players in Halloween costume to promote Halloween events in the Heart of Devon. New Visit Exeter Twitter and Facebook recently account established.</p> <p>Working with Three S Films to develop visitor promotional film from existing footage.</p> <p>Tender out on developing a new fully responsive visitor website, due to go live autumn 2014.</p>	through social media 740 times.
Provide timely, accurate and efficient information on Exeter for visitors, online and through other media sources	<p>Three new interactive monoliths installed within the city (Princesshay, Sidwell Street and Cowick Street) to provide real time public transport information and static visitor information.</p> <p>New Visit Exeter Twitter and Facebook account set up.</p> <p><a href="http://www.HeartofDevon.com">www.HeartofDevon.com</a> updated on a daily basis, with an emphasis on Exeter as a cultural visitor destination.</p>	<p>Website traffic to <a href="http://www.heartofdevon.com">www.heartofdevon.com</a> continues to increase:</p> <p>Unique views up by 51% to 196,661</p> <p>Visits up by 55% to 258,428</p> <p>Page views up by 48% to 1,231,407</p> <p>Average time spent on the 3 mins 20 sec</p>
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	Three year marketing plan drafted on how we promote Exeter & the Heart of Devon, using the RWC2015 as the springboard.	New brand and marketing campaign to be launched spring 2014.
Work with Exeter's twinning organisations to promote Exeter as a place to visit	Work will be brought under the umbrella of RWC2015 promotion during 2014 and 2015.	Rolled forward to 2014 – 15.
Introduce tourism ambassadors for Exeter to ensure that the city is recognised as a vibrant cultural destination	Through the Exeter Key Employer programme, two tourism ambassadors have been recruited - Southernhay House Hotel and Café 36. Work continues to recruit further businesses which will also	Two tourism ambassadors recruited and will be called upon for press work as and when required.

	be used by Visit England and England Rugby for RWC2015 promotion.	
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**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

<b>Action</b>	<b>Progress</b>	<b>Output</b>
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	Tourist Information provided at key events held at Westpoint Arena, the Exeter Food Festival and University of Exeter. Monthly PR issued through Visit Devon to national and regional press on major events held in Devon. Work to start on marketing Exeter & the Heart of Devon in the run up to, during and after the RWC2015. PR and communications plan drafted to inform local media of RWC2015 activity.	Animated Exeter, Exeter Food Festival, Devon County Show, Tiverton Balloon Festival, Sidmouth Folk Week, Dawish Air Show, Budleigh Salterton Literature Festival and the Exeter Christmas Market featured in local, regional and national press, including: The Guardian, the Telegraph, the Independent, plus Coast and Waitrose magazine.
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	Monthly e-newsletter sent to all TIC's in the Heart of Devon on work undertaken by the Tourism Partnership and opportunities for joint working. Across the Heart of Devon, public funding for TIC's is reducing.	Within the Heart of Devon one TIC has closed down and one has reduced services offered.
Research and develop activity/adventure tourism to increase the awareness of what there is to see and do within the Heart of Devon	RS Corporate commissioned to produce feasibility study the Exe Estuary and hinterland on its sustainable tourism potential. Ongoing discussions held with neighbouring LA's on a way forward. Activity and cycling marketing campaign developed for roll out in 2014 to promote Exeter & the Heart of Devon nationally and regionally, linking to the launch of the Exe Estuary Trail autumn 2014.	Report produced. Campaign developed to promote Exeter & the Heart of Devon for activity holidays, due to be implemented Spring 2014.

## APPENDIX 2

### Tourism Performance Indicators

<b>Tourism related Performance Indicators</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011 Baseline</b>	<b>2012</b>	<b>2013</b>	<b>% + / - from 2011</b>
Number of visitors to Exeter Visitor Information and Tickets	87,995	72,899	74,800	106,234	79,618	76,530	66,645	57,556	55,567	-16.62%
Number of accommodation bookings made in person at Exeter Visitor Information and Tickets	758	648	615	428	413	430	227	148	144	-36.56%
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	29,692	31,282	+30.71%
Number of visitors on a Red Coat Guided Tour	12,912	14,617	18,114	17,204	16,125	15,221	14,985	14,424	15,203	+1.45%
Number of visitors to the Quay House Visitor Centre	23,471	26,048	24,561	26,123	25,060	23,579	25,039	25,861	25,467	+1.60%
Number of visitors to the Underground Passages	18,459	Closed	4,753	19,863	18,896	19,517	20,554	19,768	20,439	-0.56%
Number of visitors to RAMM	233,408	247,000	192,025	Closed	Closed	Closed	32,574 (door) 285,673 (out n about)	327,455	276,823	-15.46% Compared to 2012
Number of visitors to Exeter Cathedral	187,000	142,000	170,000	131,741	109,778	108,869	110,783	TBC	TBC	Not applicable
Number of visitors to St Nicholas Priory – A Tudor Home	Closed	Closed	Closed	6,763 (Apr - Dec)	8,404	5,113	4,762	4,514	4,279	-10.14%

Number of visitors to Topsham Museum (Easter – Oct)	9,070	8,461	8,932	11,512	12,711	12,145	11,441	11,441	12,513	+9.37%
Exeter Corn Exchange ticket sales	5,335	3,551	7,398	8,396	8,314	13,784	20,003	23,352	27,110	+35.53%
Number of group bookings made through the Tourism Unit	334	363	445	500	486	425	597	462	476	-20.27%
Number of unique visitors to City Council website <a href="http://www.exeter.gov.uk/visiting">www.exeter.gov.uk/visiting</a>	33,087	30,312	Not know	Not known	Not known	196,456 (May-Dec)	223,033	454,879	455,072	+104.04%
Number of unique visitors to Tourism Partnership website <a href="http://www.heartofdevon.com">www.heartofdevon.com</a>	24,107	25,596	40,108	39,406	102,547	119,442	143,099	159,718	196,661	+37.43%
Number of inbound visitors to Exeter Airport	278,000	346,000	363,000	338,000	279,000	243,000	229,000	236,000	253,000	+10.48%
Number of Exeter Park & Ride users	1,155,521	1,190,243	1,313,471	1,369,759	1,377,237	1,401,666	1,300,759	1,325,407	986,484 (Jan-Sep)	Not applicable
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	2,418,631	2,300,220	-0.96%



## APPENDIX 3

### Economic impact of tourism within Exeter

	2009	2010	2011	2012
Direct actual jobs	2,882	2,958	2,951	3,526
Indirect actual jobs	884	856	996	1,287
<b>TOTAL ACTUAL JOBS</b>	<b>3,767</b>	<b>3,814</b>	<b>3,947</b>	<b>4,822</b>
Bed spaces	6,703	7,401	7,625	7,765
Day visits	1,568,000	1,539,000	1,688,000	1,818,000
Day visitor expenditure	£79.5 million	£77.4 million	£62.3 million	£66.9 million
Overnight trips	360,000	442,000	453,000	445,000
Overnight expenditure	£71.6 million	£81.1 million	£96.9 million	£119.6 million
Other tourism expenditure	£8.6 million	£7.7 million	£8.0 million	£9.1 million
<b>TOTAL VISITOR TRIPS</b>	<b>1,928,000</b>	<b>1,981,000</b>	<b>2,141,000</b>	<b>2,263,000</b>
<b>TOTAL VISITOR EXPENDITURE</b>	<b>£159.7 million</b>	<b>£166.2 million</b>	<b>£167.2 million</b>	<b>£195.6 million</b>

Cambridge Economic Activity Model