

REPORT TO: Economy Scrutiny Committee
Date of Meeting: 26 June 2014
Report of: Tourism Facilities Update

Is this a Key Decision?

No

Is this an Executive or Council Function?

No

1. What is the report about?

1.1 To update Members on the performance of the tourism facilities - Exeter Visitor Information & Tickets (EVIT), Exeter's Underground Passages, Quay House Visitor Centre & Red Coat Guided Tours.

2. Recommendations:

2.1 That Scrutiny Committee – Economy notes and comments on the content of the report.

3. Reasons for the recommendation:

3.1 Members have not received an update on the performance of these facilities and attractions for some time.

4. What are the resource implications including non financial resources.

4.1 Other than existing revenue budgets there are no resource implications.

5. Section 151 Officer comments:

5.1 There are no financial implications for the Council contained in this report.

6. What are the legal aspects?

6.1 None

7. Monitoring Officer's comments:

7.1 None

8. BACKGROUND

8.1 The tourism facilities are part of the Facilities & Markets section of Economy. The section also encompasses the Matford Centre, Corn Exchange, Leisure Facilities Contract Management and Markets.

8.2 A staffing review of Economy undertaken in March 2013 brought these facilities together under the management of the Visitor Facilities Officer reporting to the Events, Facilities & Markets Manager.

8.3 Much of the work of the tourism facilities crosses over with the Economy & Tourism section. Strong ties still exist between the two sections.

8.4 Work at all the facilities is to assist in the delivery of the Exeter Visitor Strategy and one of the Council's stated purposes "to provide great things to do, see and visit".

9. EXETER VISITOR INFORMATION AND TICKETS (EVIT)

9.1 EVIT carries out a number of different functions. Primarily it operates an information service to residents and visitors to the city. The centre also operates a retail function, an accommodation booking service and a box office selling tickets for shows and events in Exeter and the surrounding area.

9.2 Other functions include a front line liaison with tourism businesses within the local area including hotels, attractions and places to eat and drink. The staff also assist in the production of the tourism literature produced by Exeter City Council and undertake other occasional/seasonal duties such as providing staffing cover at the Christmas Market and the Exeter Festival of South West Food & Drink.

9.3 EVIT opens 6 days a week all year round and is staffed with 3.2 full time equivalents.

9.4 The role of EVIT and the way it functions has evolved in recent years as people change the way they access information by using websites, emails and by phone. There is a downward trend of people visiting the centre; however this has allowed the centre staff to devote time to enquiries made by different media.

9.5 The Table below highlights how the centre has handled enquiries in recent years:

	2011/12	2012/13	2013/14	Trend
Number of visitors to EVIT	66,114*	55,925	55,250	-7%
Number of other EVIT users (telephone/emails/letters)	23,650	28,085	32,637	+16%
Total number of enquiries handled by EVIT staff	89,764	84,010	87,887	+1%

Trend = The result for 2013/14 is compared to the average result over the three year period to show the percentage increase or decrease achieved in 2013/14.

* In 2011-12 the visitor number is skewed as the centre distributed 6,000 tickets (personal application only) for the Olympic Torch Relay event.

9.6 In recent years because of the reduction in footfall into the centre, new initiatives have been introduced to attract people into it. Examples include ticketing for the Olympic Torch relay event in 2012, use of the paved area outside EVIT for promotional activities, such as World of Country Life and Taiko drumming. One initiative to be developed in the next financial year is to use the centre for promotional activities for the Rugby World Cup 2015.

9.7 A successful initiative has been the development of the centre's box office facility. EVIT acts as a ticket agent for theatres, shows and events throughout the area, including Northcott Theatre, Corn Exchange, and Theatre Royal. EVIT also sells National Express tickets and coach tour tickets. EVIT gains an income through ticket sales. Below is a summary of ticket sales and income from ticket sales over the past 4 years.

	2010/11	2011/12*	2012/13	2013/14	Trend
Tickets Sold	3462	4787	4327	5653	+25%
Value of Sales	£66,888	£98,725	£75,002	£112,295	+27%
Clients	13	27	25	25	+11%
Commission raised	£1,625	£5,960	£4,286	£5,339	+22%

Trend = The result for 2013/14 is compared to the average result over the four year period to show the percentage increase or decrease achieved in 2013/14.

* In 2012-13 figures were high due to 2 large one off concerts (Jools Holland at Powderham Castle and The Coldstream Guards at Exeter Cathedral).

- 9.8 A great emphasis is placed on the need to provide a service of quality. Customer satisfaction surveys carried out in 2013 help demonstrate that this is being achieved - see appendix one.
- 9.9 In 2014 the main tourism publication to promote Exeter changed to a guide solely focussed on Exeter - the Visit Exeter Guide – previously the emphasis was on a broader geographical area. The staff based at EVIT were instrumental in obtaining £10,000 of advertising fees income for the new guide. Using the experience gained from this it is hoped that the staff will be able to gain an increased level of advertising fees for the 2015 guide and efforts will be made to identify other such income earning opportunities.
- 9.10 One of the biggest challenges currently facing EVIT is the cost of providing the service. The centre has had its revenue budget reduced by 17% in the past 4 years, from £153,030 in 2010/12 to £126,610 for the current financial year. To maintain the same level of service whilst reducing costs, the only option is to increase income.

- 9.11 Income levels from retail in EVIT have remained static over the past 3 years. The following table shows the retail income at the centre:

2011/12	2012/13	2013/14
£19,271	£17,878	£18,829

- 9.12 The Visitor Facilities Officer is exploring a number of new initiatives to increase income, these include:
- Introduction of booking fees for ticket sales
 - Seek to increase number of venues and events for ticket sales
 - Introduction of City Centre left luggage facility
 - Development of a Book-a-Bike ahead scheme
 - Introduction of a charge for attractions/accommodation providers for advertising
 - Joint retail stock purchasing with RAMM, Cathedral and other attractions within the City
- 9.13 The Visitor Facilities Officer is also exploring opportunities to increase footfall to the centre, including developing the centre as an information hub for Rugby World Cup in 2015, greater use of the square area outside the centre and to investigate sharing the centre with a third party.

10. EXETER'S UNDERGROUND PASSAGES

- 10.1 Exeter's Underground Passages is a unique tourist attraction. The centre offers guided tours of Medieval Vaulted passageways that were built to bring a fresh water supply to the city.

- 10.2 The Underground Passages are registered as an Ancient Scheduled Monument by the Department of Culture, Media and Sport. The City Council has an obligation that the passages are maintained and not allowed to deteriorate.
- 10.3 The Underground Passages re-opened in 2007 following the Princesshay development, with a new heritage centre providing interpretation and interactive exhibits. As well as the standard tours for visitors, the centre offers tours for groups and a number of special events throughout the year. The special events include:
- Easter Egg Hunts
 - Beneath the Blitz
 - Witches & Wizards Tours
 - Gory Stories & Extreme Gory Stories

A new special event is currently being developed for this Christmas on a Victorian Theme but focusing on the fire at the Theatre Royal.

- 10.4 The centre is open all year round, but has a reduced opening pattern in the winter. The centre is open 7 days per week in the peak season (June-September, and school holidays outside this period) and 6 days per week outside this period. The centre is staffed by 4.2 full time equivalents. The day to day operations at the Underground Passages are co-ordinated by the Underground Passages Supervisor.
- 10.5 Health and safety at the Underground Passages is paramount and the current staffing levels ensure that the Underground Passages can operate safely.
- 10.6 Despite the current state of the economy the Underground Passages have performed well and the number of visitors and the amount of income earned has improved since re-opening. The table below shows income and visitors since re-opening in September 2007:

	2007/08*	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	Trend
Visitors	8701	18737	18505	19854	20553	19937	20688	+5%
Income	N/A	£64,000	£74,000	£66,800	£74,200	£71,400	£80,900	+13%
Groups	40	102	92	86	100	76	100	+8%

Trend = The result for 2013/14 is compared to the average result over the 6 year period to show the percentage increase or decrease achieved in 2013/14.

* In 2007-08 figures are lower as the centre did not reopen until September.

- 10.7 The emphasis of service provision at the Underground Passages is one of quality; in 2013 the attraction maintained its accreditation of Visit England's Visitor Attraction Quality Assurance Scheme. In the report from Visit England the assessor states that "the Underground Passages offered a most enjoyable visit; standards of presentation and interpretation have been maintained at a high level and in places improved". In 2013 visitor surveys were taken; a summary of the findings are outlined in appendix one.
- 10.8 A challenge for the Underground Passages in the future will be to reduce operational costs. Over the last years 4 years the revenue budget has been reduced by 10% from £95,800 in 2010 to £86,800 in 2014. The Visitor Facilities Officer is investigating ways to increase the number of visitors and in turn the level of income. Initiatives include:
- Development of additional special events
 - Use of attraction for events and functions
 - Improved Group and visitor marketing
 - Joint ticketing with other paid attractions in the City

11. QUAY HOUSE VISITOR CENTRE

- 11.1 The Quay House has operated as a visitor centre since 1988. The centre provides visitor information, historical interpretation about the Quayside and the Canal, alongside a small retail operation. The centre is open 7 days a week in the peak season (April -October) and at weekends for the rest of the year. It is staffed by 0.9 full time equivalents.
- 11.2 In 2008 Exeter City Council reduced its funding to the centre and is now majority funded by the Exeter Quay & Canal Trust (ECQT). The Trust currently provides £47,570 to the centre with Exeter City Council providing £3,670 in 2014/15 (reduced from £9,950 in 2013/14). The grant from ECQT runs for a 3-year term, the grant for 2015 through to 2018 will be negotiated later this year.
- 11.3 The centre received a major refurbishment in 2010, when the visitor and staff facilities were greatly improved.
- 11.4 The centre acts as a hub for the Quayside area and provides information to visitors, residents and traders in this popular part of the city.
- 11.5 The table below highlights the centres performance over the past 4 years:

	2010/11	2011/12	2012/13	2013/14	Trend
Visitor Numbers	22951	26423	25742	24732	-1%
Number of group bookings	146	282	230	206	-5%
Income	£2450	£4150	£3630	£3170	-5%

Trend = The result for 2013/14 is compared to the average result over the 4 year period to show the percentage increase or decrease achieved in 2013/14.

- 11.6 The number of visitors to the Quayside is strongly influenced by the weather conditions; recent wet summers have had an impact on visitor numbers.
- 11.7 Since 2013 the staff based at Quay House have been responsible for co-ordinating the booking of the Transit shed and Piazza Terracina. This service is more efficient than it had been in the past and currently 17 events have been booked into these spaces.
- 11.8 The emphasis of service delivery at the Quay House is one of quality and the centre currently holds a Place of Interest Quality Assurance Scheme accreditation from Visit England. The key findings of the Quay House Visitor Centre Visitor Satisfaction Survey are highlighted in appendix one.
- 11.9 A challenge for the Centre in the future is to sustain and maintain the number of visitors. Recently a new Quayside leaflet has been produced that will hopefully attract more people to the Quay side. It is hoped that with more events taking place at the Quay side it will attract more visitors to the area as well as encouraging more event organisers to use the area.

12. RED COAT GUIDED TOURS

- 12.1 The Red Coat Guided Tour Service provides historic tours of Exeter and operate every day of the year except Christmas Day and Boxing Day.
- 12.2 The service is delivered by 31 volunteer Red Coat guides. In April 2013, 13 new guides joined the service after completing their training the previous winter.

- 12.3 The service offers a series of free public tours with a summer programme of 30 tours a week (17 different tours) and a winter tour programme of 16 tours a week (11 different tours). Alongside the public tours a group tour service operates, offering a variety of different tours to school groups, language schools, local history groups and twinning visits. A charge is made for the group tours.
- 12.4 The Service also offers a number of special tours throughout the year, including Spooks & Broomsticks on Halloween, Exeter Blitz on 4 May, and involvement in the annual Heritage Open Days event.
- 12.5 The Table below highlights the performance of the service over the past 4 years:

	2010/11	2011/12	2012/13	2013/14	Trend
Visitor Numbers	14628	15202	14048	14863	+1%
Income	£7637	£8218	£7531	£8955	+11%
Number of Group Bookings	N/A	N/A	148	162	

Trend = The result for 2013/14 is compared to the average result over the 4 year period to show the percentage increase or decrease achieved up to 2013/14.

- 12.6 The service is continually developing. In April 2014 two new tours were introduced to the public tour programme - Tudor Exeter and the Woollen Cloth Trade. Currently a special talk is being developed to help celebrate Exeter's involvement in the Rugby World Cup. This presentation will be focussed on Exeter's Sporting History and will hopefully be presented at various sporting venues throughout the city in 2015.
- 12.7 The guides are very distinctive and are all proud to be ambassadors for the city. In 2013 the quality of the service was recognised in a number of ways; the Red Coats were voted the 'Favourite thing to do in Devon' in a poll run by the Exeter Heart & Devon Hotels & Restaurant Association; they were also awarded the 'Trip Advisor 2013 Certificate of Excellence'. This prestigious award places the Guided Tours in the top performing 10% of all businesses worldwide. The service also holds an accreditation from Visit England's Place of Interest Quality Assurance Scheme. The service has recently been awarded the 'Trip Advisor 2014 Certificate of Excellence'.
- 12.8 In 2013 a visitor satisfaction survey measured visitors' opinions of the service; the results can be found in appendix one.

13. REVENUE BUDGETS

- 13.1 The table below shows how the Tourism Facilities performed with respect to financial management in the last financial year:

	EVIT	Underground Passages	Quay House Visitor Centre	Red Coat Guides
Budget (£)	134,030	90,870	9,950	8,530
Actual Spend (£)	133,938	83,714	7,300	13,000
% Variance	0%	-9%	-36%	+45%

- 13.2 The Red Coat Guided Tour budget was over spent by £4,470; the main reason for this was to provide new guides with training and uniforms. The number of new recruits was a lot higher than in the past because in the previous year the number of guides had fallen to a level where it would have been difficult to operate the service.

14. HOW DOES THE DECISION CONTRIBUTE TO THE COUNCIL'S CORPORATE PLAN?

- 14.1 The Tourism facilities contribute to the Council's Corporate Plan by providing great things to do, see and visit. Emphasis is on quality and to enhance the City's cultural offering. As well as providing top quality attractions the facilities help to promote what else is going on in the city from independent attractions to festivals and events
- 14.2 The Tourism facilities also support the local economy in assisting local businesses to run successfully, through promotion of attractions, places to stay and places to eat

15. What is the impact of the decision on equality and diversity; health and wellbeing; safeguarding children, young people and vulnerable adults, community safety and the environment?

- 15.1 The facilities provide a service that meets the councils commitment to equality and diversity. Information, interpretation is available in different formats and languages. All of the centres are DDA compliant and the Red Coat Guides are able to amend their tour routes should any customers have mobility issues.
- 15.2 EVIT is involved in the Little Shoppers campaign to protect children that may be lost within the shopping centre
- 15.3 All facilities are signed up to the Exeter Businesses Against Crime scheme and are in a position to report any thing that may have an impact on the local environment and community safety

16. WHAT RISKS ARE THERE AND HOW CAN THEY BE REDUCED?

- 16.1 The main risk to the service is cost of provision; this report outlines the initiatives being pursued to control costs.

David Lewis, Events, Facilities and Markets Manager
Richard Ball, Assistant Director Economy

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

Contact for enquires: Democratic Services (Committees), Room 2.3, 01392 265275

Appendix One

Results from EVIT Visitor Satisfaction Surveys 2013

	Excellent	Good	Neither	Poor	Very Poor
Accessibility & Sign posts	39%	45%	13%	3%	0%
Customer Service	66%	32%	0%	0%	2%
Goods & Services	45%	47%	8%	0%	0%
Overall Impression	53%	39%	8%	0%	0%
Range of Information	58%	37%	5%	0%	0%
Speed of Service	63%	34%	0%	0%	3%

Results based on a sample size of 87 surveys.

These results highlight that over 90% of respondents thought that in all aspects of service delivery except sign posting of the location at 84% the level was good or excellent.

Results from the Underground Passages Visitor Satisfaction Surveys 2013

	Excellent	Good	Neither	Poor	Very Poor
Accessibility & Sign posts	52%	41%	6%	0%	1%
Audio-visual presentation	63%	29%	7%	0%	1%
Customer service	76%	20%	3%	0%	1%
Interactive displays	51%	41%	5%	2%	1%
Interpretation displays	51%	46%	1%	0%	2%
Overall impression	64%	28%	2%	0%	1%
Speed of Service	72%	27%	0%	0%	1%
Tour Underground	77%	18%	1%	1%	1%

Results based on a sample size of 77 surveys.

These results highlight that over 90% of respondents thought that in all aspects of service delivery the level was good or excellent.

Results from Quay House Visitor Centre Visitor Satisfaction Surveys 2013

	Excellent	Good	Neither	Poor	Very Poor
Accessibility & Sign posts	65%	26%	5%	4%	0%
Audio-visual presentation	56%	31%	13%	0%	0%
Customer service	75%	23%	2%	0%	1%
Goods & Services available	54%	41%	5%	0%	0%
Information available	73%	23%	4%	0%	0%
Interpretation displays	66%	28%	6%	0%	0%
Overall Impression	72%	22%	6%	0%	0%
Speed of Service	77%	20%	3%	0%	0%

Results based on a sample size of 29 surveys.

These results although from a relatively small sample size highlight that over 90% of respondents thought that in all aspects of service delivery except the audio-visual presentation at 87% the level was good or excellent.

Results from Red Coat Guided Tours Visitor Satisfaction Surveys 2013

	Excellent	Good	Neither	Poor	Very Poor
Content of Tour	76%	22%	2%	0%	0%
Customer service	79%	18%	3%	0%	0%
Delivery of Tour	76%	22%	2%	1%	0%
Overall impression	78%	19%	3%	0%	0%
Sign posting	47%	36%	10%	6%	1%
Variety of tours on offer	67%	28%	5%	0%	0%

These results are based on a sample of 156 questionnaires.

The results of the surveys highlight that over 90% of respondents thought that in all aspects of service delivery except for sign posting at 83% the level was good or excellent.