REPORT TO: **SCRUTINY COMMITTEE – ECONOMY**
Date of Meeting: **Scrutiny Committee Resources – 13 November 2014**
Report of: **Assistant Director Economy**
Title: **Exeter & the Heart of Devon Visitor Research 2014**

Is this a Key Decision?
No

Is this an Executive or Council Function?
No function is being exercised. This report is for information only.

1. What is the report about?

1.1 To report on the results of the Exeter & the Heart of Devon online visitor survey which was conducted March – June 2014, with the results informing future marketing activity.

1.2 To report on the annual volume and value of tourism data for Exeter & the Heart of Devon, through the Cambridge Economic Activity Model and the results of the Visit England visitor satisfaction tracker for Devon.

2. Recommendations:

2.1 **That Scrutiny note the report and comment on the results of the Exeter & the Heart of Devon visitor survey, volume and value data and the Visit Devon brand tracker research.**

3. Reasons for the recommendation:

3.1 To inform members on the type and number of visitors to the area, visitor spend, why they choose to visit and their expectations from visiting Exeter & the Heart of Devon.

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

4.1 The results of all research projects will be used to adjust marketing activity undertaken by the Exeter & the Heart of Devon Tourism Partnership. The annual budget, which sits external to Exeter City Council, varies annually depending on the number of members and advertising income gained.

4.2 Marketing activity, on behalf of the Tourism Partnership, is undertaken by the Tourism Promotion & Support Officer (3 days per week) of Exeter City Council, some of their work will be adjusted as a result.

5. Section 151 Officer comments:

5.1 There are no financial implications contained in this report.

6. What are the legal aspects?

6.1 No legal aspects - this item is for information only.

7. Monitoring officer Comments:

7.1 No issues arising from the content of this report.

8. Background

8.1 In January 2014, Visit Devon (county wide Destination Management Organisation) commissioned and paid for The South West Research Company to undertake an online visitor survey, the first of its kind. The purpose of the visitor survey was to gain valuable information on why someone chooses to holiday in Devon, what they do whilst on holiday in the county, where they stay and their expectations prior and post holidaying in Devon.

8.2 Email contact details, collected in the previous 5 years, held by Visit Devon and the six Area Tourism Partnerships in Devon were sent a link to the online visitor survey early in summer 2014. These email addresses had been gathered from people requesting a copy of the Area Tourism Partnerships' visitor guide or signing up to their e-newsletter. The Area Tourism Partnerships in Devon are:

- Exeter & the Heart of Devon
- Visit South Devon
- English Riviera Tourism Partnership
- Dartmoor Partnership
- Visit Plymouth
- North Devon +
- Visit Devon

An incentive provided by local tourism businesses was included within the visitor survey to encourage people to participate in the visitor survey.

8.3 569 respondents, out of the 3,240 who completed the Devon wide survey, indicated that they had either stayed overnight in Exeter & the Heart of Devon or had visited on a leisure day trip during their last trip to Devon. This data has been extrapolated for people who visited and stayed within Exeter & the Heart of Devon to attempt to model the interest and behaviour of the typical visitor to the area to inform future marketing and promotional strategies.

9 Exeter & the Heart of Devon online visitor survey

9.1 From the 569 who completed the online survey, we can build a clear picture of the type of person who visits the area and their motivation, which then informs how we market the area going forward in 2015 and 2016. A copy of the full report is available on request from the Economy Unit.

9.2 The majority of visitors to Exeter & the Heart of Devon are aged 45+, visit in an adult only group (spouse, partner or friend) and are predominately from ABC1 socio economic groups. Over three quarters visit the area for a leisure/holiday trip. 72% of visitors to the area live outside the South West, with 2% from overseas. The table below gives a more detailed breakdown of where visitors live:

South West		**Other English Counties**	
Bath	3%	West Midlands	9%
Bristol	5%	London	7%
Cornwall	1%	Kent	5%
Devon	7%	Berkshire	4%
Dorset	4%	Hampshire	4%
Gloucestershire	2%	Lancashire	4%
Somerset	2%	Yorks & Humbs	4%
Wiltshire	2%	East Sussex	3%
Sub Total	**26%**	Essex	3%
		Surrey	3%
		Cambridgeshire	2%
		Derbyshire	2%
		Hertfordshire	2%
		Other counties	13%

		Sub Total	**65%**
Wales	5%	Overseas	2%
Scotland	2%		

9.3 The peak time for people to visit the area is July and August, closely followed by May and June. The majority of visitors stay in serviced accommodation (Hotel & B&B), followed by a caravan and a self-catering property, and typically stay for 4.74 nights. A day visitor typically spends 6 ½ hrs visiting a destination. 88% of all visitors travel to the area by car and 8% by train, which highlights the importance of accessible and well signposted car parks and Park & Rides throughout the area.

9.4 The table below highlights why a visitor chooses to visit Exeter & the Heart of Devon, the types of places they visit whilst on holiday and what type of activities they take part in. The results below will help inform how we market the area to visitors for a day visit and overnight stay in terms of the places and activities we promote to attract more visitors and the photos used.

Top 10 reasons for choosing to visit Exeter & the Heart of Devon		**Top 10 places visited whilst on holiday in Exeter & the Heart of Devon**		**Top 10 activities taken part in whilst on holiday in Exeter & the Heart of Devon**	
Scenery and landscape	67%	Cities, towns and villages	60%	Eating & drinking	76%
Beaches	58%	Beaches	55%	Shopping	64%
Been before	51%	Harbours and marinas	43%	Short walk	58%
Range of attractions and places to visit	48%	Countryside	35%	Time at the beach	46%
Plenty to see and do	45%	Family attractions	35%	Long walk	22%
Atmosphere and ambience	37%	Gardens	31%	Visit swimming pool	14%
Weather and climate	32%	Historic house	20%	Visit festivals and events	9%
Peace and quiet	29%	Piers	19%	Fishing	6%
History and heritage	27%	Historical and heritage sites	18%	Sailing	4%
Price and availability	22%	Museums	16%	Visiting the cinema	4%

9.5 The most popular destinations people visit within Exeter & the Heart of Devon are:

1. Exeter
2. Dawlish
3. Exmouth
4. Sidmouth
5. Teignmouth
6. Beer
7. Seaton

The focus is on Exeter and towns and villages along the coast, which ties in with the table above in terms of places visited and activities taken part in whilst on holiday. Interestingly this does not include towns and villages within the countryside, considering we have two Area's of Outstanding Natural Beauty (AONB) within the area, it's surprising.

9.6 Within the online visitor survey the Tourism Partnership were keen to learn visitors thoughts and opinions on their visit to the area, to inform businesses and partners in how to improve their product/offering to attract more visitors to the area. Out of a total of 27 indicators, some of which are shown below, 19 received a satisfaction rating of 4.00 or more (out of 5.00), well above the industry norm.

9.7 The table below shows visitor satisfaction scores (out of 5.00) on quality, range and value for money on the usual facilities/businesses a visitor comes across on their visit to an area:

	Accommodation	Places to visit	Eat and drink	Shops
Quality of service	4.52	4.53	4.47	4.33
Range & quality	4.53	4.52	4.49	4.35
Value for money	4.29	4.20	4.17	N/A

9.8 A range of questions were also asked on the type of facilities and a visitor comes across on their holiday/trip to the area, which also have an impact on residents living in the area and why a business chooses to relocate to Exeter & the Heart of Devon, again these satisfaction scores are out of 5.00:

- Cost of parking 3.35
- Ease of parking 3.63
- Location of car parking 3.67
- Safety within car parks 3.87
- Pedestrian signs 3.98
- Road signs 4.02
- Availability of public toilet 3.70
- Cleanliness of the streets 4.07
- Cleanliness of beaches 4.38
- Overall enjoyment of the area 4.69

Due to their low scores, car parking, toilets and pedestrian signage could be an area for improvement to improve the visitor experience.

9.9 Finally and most importantly 51% of respondents said that their visit to the area had exceeded their expectations, 64% of respondents would recommend visiting the area to friends and family and 95% would be likely or very likely to re-visit the area. These are Exeter & the Heart of Devon's promoters and ambassadors. Marketing the area to previous visitors is key to encouraging repeat visits, these ambassadors are more than likely to recommend the area to their family and friends.

9.10 The results of the online visitor survey and the volume and value data (below) will inform and guide future marketing activity in terms of images used to promote the area, what type of places we promote, where we promote the area and what type of person we target to visit the area. The results will also guide what type of businesses we target for membership of the Tourism Partnership. The results of the online visitor survey will be shared with members of the Tourism Partnership, local authorities, Exeter Cultural Partnership, partners and the business community to inform them on product development opportunities.

10 Cambridge Economic Activity Model

10.1 Exeter & the Heart of Devon Tourism Partnership, as well as other tourism partnerships in the rest of Devon, commission The South West Research Company to undertake annual volume and value research on the visitor economy. This research identifies how many people visit the area, the type of visitor, how much, and on what, they spend on their trip, and the number of jobs supported by this spend. This research is used to monitor trends over time and changes within the visitor economy; with the results being used to alter marketing activity and investment within the visitor product. Appendix 1 shows the latest available data for Exeter & the Heart of Devon.

10.2 Comparing 2013 to 2012 there has been some small increases and decreases with the number of people visiting the area and how much they spend whilst on holiday:

- an increase in day trips to the area by 0.88% to 11.6 million
- a decrease in day visitor spend of 1.41% to £387.9 million
- a decrease in the average spend per day trip of 2.26% to £33.26

- a decrease in overnight trips of 1.77% to 1.7 million
- an increase in overnight spend of 34.48% to £557 million
- an increase in the average spend per overnight trip by 36.89% to £314.48
- a decrease in the spend from people visiting friends and relatives by 13.76% to £25.4 million
- an increase in spend from people visiting second homes and visiting boats by 112% to £3.1 million

10.3 As shown above, average spend per day visitor has reduced by 2.26% to £33.26. There are slightly more people visiting Exeter & the Heart of Devon, but spending less money on their day trip to the area. The average spend per overnight trip has increased by 36.89% to £314.48. There are less people visiting Exeter & the Heart of Devon for an overnight trip, but spending significantly more on their trip, especially on food and drink and shopping.

10.4 The results above are consistent with national trends and show the area as performing slightly better than other destinations. Using data from the online visitor survey and the Cambridge Economic Activity Model, the challenge and aim for next year is to increase the number of people visiting the area for a day trip but primarily for an overnight stay, be it for business or leisure using the Rugby World Cup as the hook to promote Exeter & the Heart of Devon regionally, nationally and internationally.

11 **Devon Visitor Satisfaction & Imagery Tracker**

11.1 To gain a better understanding of how Devon compares to other destinations within England, Visit Devon participated in the Visit England brand tracker survey. The research took place between June 2013 and May 2014, with destinations financially contributing to participate in this research.

11.2 An online visitor survey is sent to approx. 100 English residents per week over a 12 month period (5,000 in total), who take at least one nights holiday in paid accommodation. Respondents to the survey were asked to score Devon against a bank of visitor satisfaction and imagery statements. Other participating destinations included: Bournemouth, Great Yarmouth, Skegness, Hampshire, Kent, New Forest, Peak District and Staffordshire. Within the final report, Devon is compared to the above destinations to determine how we perform for visitor satisfaction and perception.

11.3 Overall, Devon rates higher than the England average for most of the visitor satisfaction statements, especially:

- Clean and well maintained beaches
- A place where I feel safe and secure
- Beaches which are safe and suitable for bathing
- Welcoming and friendly people
- Quality of accommodation
- Clean and tidy environment

The only real underperforming area for Devon is the availability of well known festivals, music, sporting events and the range of outdoor activities. The full range of visitor satisfaction indicators can be found in Appendix 2.

11.4 Devon outperforms the overall average for competitor destinations across all attributes and scores highly in the following:

- Has lots of things to see and do
- Is good for couples
- Allows you to relax
- Offers a arrange of choice of different types of breaks
- Is a real escape from everyday life
- Makes me feel I've had a proper holiday

The full range of imagery statements can be found in Appendix 3.

11.5 The results of the Visit England brand tracker research are very positive in terms of a visitors perception of Devon. The results of the research will be incorporated into marketing material for Exeter & the Heart of Devon, especially in the use of photos showing people relaxing and enjoying the city, coast and countryside. One area to focus marketing activity on would be on the promotion of events and festivals as this scored low within visitor satisfaction levels; which nicely coincides with Rugby World Cup and the Festival of Rugby in 2015.

12 Future Position

12.1 The results of the online visitor survey will be used to determine marketing activity to promote Exeter & the Heart of Devon within the South West region and throughout the rest of the UK to increase overnight visitors to the area, drawing in Rugby World Cup and Festival of Rugby activity. Due to limited budget and personnel resources, marketing the area overseas will be limited to partnership working with Visit England.

12.2 The results of all three research projects will be shared with members of the Exeter & the Heart of Devon Tourism Partnership, Exeter Cultural Partnership, partners and local authorities so that businesses can use the results to help inform their marketing activity and to improve their product offering to attract more visitors, especially overnight.

12.3 The online visitor survey will be conducted every two years to track visitor trends. The Cambridge Economic Activity Model will continue to be commissioned every year to monitor visitor volume and value to Exeter & the Heart of Devon.

13 How does the decision contribute to the Council's Corporate Plan?

13.1 Exeter & the Heart of Devon Tourism Partnership contributes to 'Building a stronger sustainable city' and the main purpose of 'Help me run a successful business in Exeter' in promoting the city as a vibrant, cultural modern city in attracting people to visit the area thus spending money in the local economy and supporting jobs.

14 What risks are there and how can they be reduced?

14.1 Limited risk arising from this activity.

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

15.1 The Exeter & the Heart of Devon Tourism Partnership promotes the area regionally and nationally to encourage people to visit the area, thus spending money here rather than elsewhere, which supports local employment and the economy. Promotional activity in 2014 has been focused on cycling, this will continue during 2015 due to developments within the cycling infrastructure as well as other outdoor and indoor activities – which promotes a healthy lifestyle.

16 Are there any other options?

16.1 Visit Devon fund the majority of research undertaken within this committee report. It would be unwise for the Exeter & the Heart of Devon Tourism Partnership to commission additional research as it would duplicate work already undertaken, plus it would not gain the national reach.

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

Background papers used in compiling this report:
None

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APPENDIX 1

Economic impact of tourism within Exeter and the Heart of Devon 2013

	Exeter	**East Devon**	**Mid Devon**	**Teignbridge**	**TOTAL**
Direct actual jobs	3,362	5,425	2,053	5,539	16,379
Indirect actual jobs	1,253	1,709	378	1,717	5,057
TOTAL ACTUAL jobs	4,615	7,134	2,431	7,259	21,439
Day visits	1,714,000	4,288,000	1,808,000	3,855,000	11,665,000
Total Day visit spend	£63,032,000	£142,543,000	£55,706,000	£126,699,000	£387,980,000
▪ Shopping	£27,423,000	£37,044,000	£17,309,000	£37,036,000	£118,812,000
▪ Food & Drink	£23,507,000	£63,621,000	23,377,000	£54,642,000	£165,147,000
▪ Attractions & Entertainment	£6,166,000	£16,962,000	£7,772,000	£15,500,000	£46,400,000
▪ Travel	£5,936,000	£24,916,000	£7,248,000	£19,521,000	£57,621,000
Overnight trips	449,000	521,000	207,000	594,300	1,771,300
Total Overnight trips spend	£121,382,000	£263,058,000	£40,948,000	£131,664,000	£557,052,000
▪ Accommodation	£41,306,000	£43,194,000	£14,368,000	£47,667,0000	£146,535,000
▪ Food & Drink	£25,924,000	£90,046,000	£9,191,000	£29,518,000	£154,679,000
▪ Shopping	£23,216,000	£55,528,000	£6,427,000	£18,916,000	£104,089,000
▪ Travel	£16,973,000	£44,087,000	£6,586,000	£21,843,000	£89,489,000
▪ Attractions	£13,963,000	£30,203,000	£4,376,000	£13,720,000	£62,262,000
Visits to friends & relatives spend	£6,714,000	£7,463,000	£4,338,000	£6,945,000	£25,460,000
Other tourism spend	£163,000	£1,766,000	£180,000	£1,008,000	£3,117,000
TOTAL VISITOR SPEND	**£191,291,000**	**£272,254,000**	**£101,172,000**	**£266,316,000**	**£831,033,000**
TOTAL VISITOR TRIPS	**2,163,000**	**4,809,000**	**2,015,000**	**4,449,300**	**13,436,300**

Appendix 2

Imagery

%	Bourne-mouth	Great Yarmouth	Hampshire	Kent	New Forest	Peak District	Skegness	Staffordshire	Devon	Cornwall
Is easy to get to	24	19	27	23	24	28	19	21	23	21
Has lots of things to see and do	20	19	28	23	25	33	13	16	38	42
Is good for couples	22	14	31	19	28	31	12	15	32	35
Is good for families with kids	31	37	30	16	28	20	37	10	39	42
Offers unique experiences	14	12	33	14	32	35	12	12	28	36
Allows you to relax	22	16	35	17	33	33	13	12	39	42
Is a great way to spend time with friends	18	15	25	15	21	24	13	12	27	31
Creates lasting memories	15	15	25	16	23	28	12	12	31	36
Offers a range of choice of different types of breaks	19	16	26	20	23	27	12	16	36	38
Is good value	19	20	19	14	17	24	24	12	23	24
Offers great food	15	12	18	17	16	19	10	13	30	32
Is a real escape from everyday life	15	12	30	13	29	34	11	10	34	38
Delights and surprises	11	10	22	12	20	24	8	9	26	32
Makes me want to return again and again	13	10	22	10	20	24	8	6	30	36
Makes me feel I've had a proper holiday	15	12	20	12	18	23	9	8	33	38

Appendix 3

Visitor Satisfaction

	%- rating attribute as excellent									
	All England	Bourne-mouth	Great Yarmouth	Hamp-shire	Kent	New Forest	Peak District	Skegness	Stafford-shire	Devon
Unspoilt countryside (COUNTRYSIDE)	41	-	-	38	-	40	47	-	11	39
A place where I feel safe and secure	27	24	28	27	30	33	34	34	19	34
Quality of accommodation	26	24	34	26	25	23	35	28	19	31
Opportunities to see famous buildings and monuments (CITIES)	30	24	-	24	-	-	-	-	-	-
Interesting towns and villages to see (COUNTRYSIDE)	29	-	-	25	-	24	28	-	11	26
Welcoming and friendly people	25	24	33	22	23	21	36	27	17	31
Clean and tidy environment	23	24	26	27	26	30	30	24	10	30
Opportunities to visit museum/galleries an contemporary arts (CITIES)	28	-	-	22	-	-	-	-	-	-
Clean and well maintained beaches (SEASIDE)	28	23	26	-	18	-	-	21	-	36
Value for money accommodation	23	24	31	23	21	19	29	29	13	29
Quality of food, drink and dining	22	19	26	25	23	24	29	27	16	26
Good range of shopping opportunities (CITIES)	27	-	-	20	-	-	-	-	-	-
Beaches which are safe and suitable for bathing (SEASIDE)	27	20	25	-	-	-	-	22	-	34
Ease of booking your trip/ different parts of your trip in advance	23	21	31	23	28	22	34	23	13	28
Variety of accommodation to choose from that suits my needs	22	22	32	22	23	21	22	26	9	26
Levels of Customer Service	21	21	24	24	21	23	19	25	10	27
Ease of finding useful information about destination when planning the trip	22	18	24	19	24	17	31	21	16	26
A destination that doesn't take too long to get to	21	18	22	24	26	27	23	28	10	17
Availability of a wide range of attractions and things to do	21	17	25	18	17	14	22	25	13	20
Attractive/ well maintained town/ city centre (CITIES)	24	-	-	23	19	-	-	-	-	-
Value for money generally	20	20	30	20	24	17	23	28	14	25
Opportunities to eat/drink local food and produce	19	17	28	-	22	15	26	23	10	23
Attractive/ well maintained town/city centre (SEASIDE)	24	20	22	-	-	-	-	23	-	27
A destination that isn't too expensive to get to	20	17	23	21	22	22	24	28	7	18
Ease of finding useful information about the destination when you're there	19	19	24	19	18	19	20	24	-	21
Overall availability of deals and discounts for the destination	17	-	24	-	19	16	17	23	11	20
Clarity of signposting that helps you find your way around the destination	18	15	22	19	17	19	22	24	-	17
Availability of individual/ independent local shops	17	16	24	-	17	15	19	19	10	20
Range of outdoor activities (COUNTRYSIDE)	20	-	-	19	-	21	23	-	7	11
A destination that is easy to get to by public transport	16	15	-	-	16	9	-	16	-	-
Ease of getting around by public transport	16	15	-	-	16	8	-	20	-	13
Availability of reasonably priced car parking	15	17	24	-	16	14	-	20	7	15
The nightlife (CITIES)	-	-	-	-	-	-	-	-	-	-
Availability of festivals, music, sporting and cultural events	-	-	-	-	-	8	-	-	-	12
The range of water based/ beach activities (SEASIDE)	-	-	-	-	-	-	-	-	-	22