

REPORT TO: ECONOMY SCRUTINY COMMITTEE
Date of Meeting: 22 January 2015
Report of: Economy & Tourism Manager
Title: Update on the Exeter Visitor Strategy 2012 – 2016

Is this a Key Decision?

No

Is this an Executive or Council Function?

Executive. This report is for information only and gives an update on a service area.

1. What is the report about?

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

2. Recommendations:

2.1 Members comment on the progress made with implementing the Exeter Visitor Strategy 2012 – 2016 and support the actions proposed to be undertaken during 2015 – 2016 focusing on promoting the area for Rugby World Cup 2015.

3. Reasons for the recommendation:

3.1 To inform members of the progress made.

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

4.1 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.

Tourism Unit Budget 2014 – 2015	Net
Tourism Administration (staff and central re-charges)	£145,500
Tourism Marketing	£61,650
Heart of Devon Tourism Partnership (projected income)	£46,000
Total	£253,150

4.2 The budget remains unchanged for 2015/16, except for limited allowances for inflation and changes to employee costs. Staffing of 1.2 FTE within Economy Unit are dedicated to delivering actions from the Exeter Visitor Strategy.

5. Section 151 Officer comments:

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

6. What are the legal aspects?

6.1 None – this report is for information only.

7. Monitoring Officer's comments:

7.1 This report raises no issues for the Monitoring Officer.

8. Background:

- 8.1 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.
- 8.2 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”.
- 8.3 Since adoption of the strategy a number of new developments and refurbishments have been completed including John Lewis, Magdalen Chapter Hotel, Southernhay Hotel, Sandy Park, Exe Estuary Trail, 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.
- 8.4 Future developments at the bus station site, IKEA, Exeter Cathedral development proposals, 1 more Premier Inn Hotel and Exeter being a Host City for Rugby World Cup in 2015 will further improve the appeal of the city to the short break and day visitor market.

9. Progress to date

- 9.1 The following five priorities of the strategy were agreed to be implemented in partnership with the tourism business community in the city, the Exeter & the Heart of Devon Tourism Partnership and Visit Devon:
- 9.1.1 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
- 9.1.2 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
- 9.1.3 Priority 3** - Raise skill levels of the existing visitor workforce and prepare those with the potential for entering employment in the sector
- 9.1.4 Priority 4** - Develop more effective and targeted visitor marketing of Exeter locally, regionally, nationally and internationally
- 9.1.5 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
- 9.2 An overview of progress made and outputs achieved made during 2014, against the priorities, is listed in Appendix 1. Below is a selection of achievements:
- Record number of tourism businesses receiving awards
 - 2 interns working within Economy to assist in delivering strategy
 - Funding received to run training courses
 - Exeter and Exe Estuary Trail featured in national cycling campaign
 - Membership manager appointed to increase number of Heart of Devon members
 - Record increase in website traffic to www.heartofdevon.com

- Extensive visitor research undertaken during 2014

10. Performance Monitoring

- 10.1 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 Strategy.
- 10.2 The 'Cambridge Economic Impact Model' is commissioned every year to estimate the volume and value of tourism to the economy. 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.
- 10.3 From the most recent Cambridge Economic Impact Model (2013), which can be seen below, it is estimated that tourism is worth in the region of £191.2 million annually to the Exeter economy. Some 4,600+ jobs are supported within hotels, attractions, cultural venues, eating out venues and transport facilities within the city from the above visitor spend. The Cambridge Economic Impact Model is a useful indicator of trends, but the absolute figures are the results of a model not comprehensive information. Similarly, with this information, data for 2011 has been used as the baseline for the Exeter Visitor Strategy.
- 10.4 The main points arising from comparisons from 2011, the baseline year, to 2013 include:
- day visitor trips increased by 1.54% to 1.7m
 - overnight trips decreased by 0.88% to 449,000
 - accommodation spend increased by 21.11% to £41.3m
 - spend by visitors shopping increased by 14.74% to £50.6m
 - spend by visitors on food & drink increased by 12.02% to £49.4m
 - spend by visitors on visiting attractions increased by 18.24% to £20.1m
 - total tourism spend has increased by 14.29% to £191.2m
 - total actual jobs supported by tourism spend has increased by 16.291% to 4,615
- 10.5 The target of a 5% increase in visitor spend and employment (related to visitor spend) has been achieved, as shown in 10.4. A full breakdown of visitor spend was detailed in a report to Scrutiny Committee Economy on 13 November 2014.

Exeter	2006	2007	2008	2009	2010	2011 Baseline	2012	2013
Type of spend	£ million	£ million	£ million	£ million	£ million	£ million	£ million	£million
Accommodation	£24.8	£26.9	£25.8	£25.1	£28.9	£34.1	£40.7	£41.3
Shopping	£46.2	£47.1	£49.2	£47.6	£47.2	£44.1	£50.7	£50.6
Food & Drink	£43.0	£44.8	£45.7	£44.6	£46.3	£44.1	£50.6	£49.4
Attractions & Ent.	£16.1	£17.1	£16.8	£16.4	£16.4	£17.0	£20.4	£20.1
Travel	£17.1	£18.4	£18.0	£17.5	£19.2	£19.9	£24.1	£22.9
Visiting Friends & Relatives, boats, second homes	£10.3	£11.3	£9.4	£8.5	£7.7	£8.0	£9.1	£6.9
TOTAL	£157.4	£165.6	£164.9	£159.7	£166.2	£167.3	£195.6	£191.2
Total estimated Jobs (supported by spend)	3,616	4,004	4,111	3,767	3,898	3,947	4,823	4,615
Overnight trips	383,000	392,000	369,000	360,000	442,000	453,000	445,000	449,000
Day visitor trips	1,580,000	1,576,000	1,611,000	1,568,000	1,539,000	1,688,000	1,818,000	1,714,000

10.6 The figures for neighbouring districts show much larger numbers of people visiting the wider area who then need to be attracted into the city to spend in city shops and restaurants. 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.

10.7 In the wider area of East Devon, Mid Devon and Teignbridge the visitor economy is worth £639.7 million, supporting 16,824 jobs in the area as shown in the table below.

East Devon, Mid Devon & Teignbridge	2007	2008	2009	2010	2011	2012	2013
Type of spend	£ million	£ million	£ million	£ million	£ million	£ million	£ million
Accommodation	£114.9	£94.9	£112.3	£91.6	£92.5	£105.3	£105.2
Shopping	£136.4	£80.9	£142.1	£134.7	£130.2	£139.4	£135.1
Food & Drink	£173.6	£166.4	£182.1	£173.1	£190.3	£205.7	£206.6
Attractions & Ent.	£63.2	£57.9	£64.9	£59.1	£67.4	£71.8	£71.4
Travel	£83.4	£75.7	£84.9	£78.5	£87.6	£98.4	£99.7
Visiting Friends & Relatives, boats, second homes	£32.7	£28.1	£25.8	£24.1	£23.8	£28.6	£21.7
TOTAL	£604.2	£503.9	£612.1	£558.1	£591.8	£649.2	£639.7
Total estimated Jobs (supported by spend)	16,583	15,124	16,192	14,800	15,145	17,377	16,824
Overnight trips	1,588,300	1,351,700	1,559,000	1,300,300	1,338,000	1,353,000	1,322,000
Day visitor trips	5,974,000	5,995,000	6,328,000	6,437,899	9,247,000	9,735,000	9,951,000

10.8 From a recent report issued by England 2015, the organisers of Rugby World Cup 2015, it is estimated that Exeter being a Host City will generate an extra £39 million of economic activity for the city. Sandy Park is expected to welcome an additional 33,000 spectators, with the Fanzone attracting an additional 120,000 visitors to the city. With three matches being held at Sandy Park, the city is likely to gain an additional 12,000 international visitors.

11. Exeter & the Heart of Devon Tourism Partnership

11.1 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.

11.2 Neighbouring local authorities contribute to visitor promotion in a variety of ways, Teignbridge District Council choosing to financially support another Area Tourism Partnership covering South Devon. East & Mid Devon do not financially contribute to any local promotional activity. They 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.

11.3 As covered by a separate report to this committee, Exeter is one of the Host Cities for Rugby World Cup 2015 – a once in a lifetime opportunity for the city. All promotion through England 2015, the IRB and Visit England will be about promoting Exeter as a Host City with the main call to action being www.heartofdevon.com/rugbyworldcup. Together with the Tourism Partnership, Exeter is embracing Host City status and is proactively promoting this, locally, regionally and internationally to increase visitor trips and spend and inward investment into the city.

11.4 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. A particular aim of the Tourism Partnership is to

promote the area for a cultural short break holiday both regionally and nationally (and internationally where appropriate) to increase visitors to the city.

- 11.5 As of November 2014, membership of the Tourism Partnership stands at 302 businesses, which mainly includes accommodation, attractions and activity providers based within Exeter, East Devon, Mid Devon, Teignbridge and further afield in Devon. Each business pays an annual membership fee which contributes to promotional activities. The table below shows the breakdown of where a member is located within the Tourism Partnership. The majority of members pay their membership fee direct to the Tourism Partnership, with 45 being a member through the Exeter & the Heart of Devon Hotels & Restaurants Association, who receive a small discount for bulk membership.

	Direct membership	Membership through an association	Total
Exeter	74	17	91
East Devon	91	9	100
Mid Devon	40	3	43
Teignbridge	27	4	31
Outside of the area	25	12	37
Total	257	45	302

- 11.6 The membership scheme for the Tourism Partnership was revised April 2014, to coincide with the beginning of the new membership year, with the aim of increasing membership and income. An experienced sales person has been employed for the previous 10 months to grow the membership base by recruiting additional food & drink, activity and retail organisations within the catchment area. Membership has grown from 240 in November 2013, to 302 in November 2014.
- 11.7 The contract to manage media relations through Astley Media and online marketing through Rokk Media were both extended in autumn 2014. The Tourism Partnership is working with both companies to improve and increase marketing activity by the Tourism Partnership, especially in the run up to Rugby World Cup 2015.
- 11.8 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 Rugby World Cup 2015
- 11.9 During the previous 12 months Rokk Media have been developing and improving the Tourism Partnership's website (www.heartofdevon.com) to ensure that content is relevant to what people are searching for and that the website is updated on a regular basis. Events are the most popular pages within the website, used by both residents and visitors to the area. For example 5 November 2014 was the busiest day to date with over 9,000 unique visits to the website – all related to bonfire events in the area.
- 11.10 Comparing 2014 to 2013 (Jan-Nov), traffic to the website has performed beyond expectations:
- Unique visits to the website increased by 133% to 423,047
 - Hits to the website increased by 119% to 16,834,430
 - Page views increased by 82% to 2,109,390
 - Twitter followers increased by 48% to 9,090
 - Facebook likes increased by 883% to 6,071

11.11 Over the previous 12 months the Tourism Partnership has undertaken a number of promotional activities to promote the area for short breaks and long holidays:

- Developed and managed a national cycling campaign on the back of the opening of the Exe Estuary Trail and the Tour of Britain departing from Exeter
- Re-designed www.visitexeter.com to be a one stop shop for all things Rugby World Cup 2015
- Implemented a Facebook campaign to achieve greater visitor engagement
- Two Visit Exeter videos produced and distributed on YouTube to promote the city for short breaks
- Rugby animation video produced to raise awareness of Exeter as a Host City for Rugby World Cup 2015
- Developed a new membership scheme and pricing structure to increase membership and income
- Carried out ongoing monthly proactive and reactive media work through Astley Media, primarily related to Rugby World Cup launches
- Distributed ongoing bi-monthly e-newsletter to visitor database (30k+)
- Segmented customer database (30k+) to undertake target marketing
- Built a new conference website (www.conferencedevon.co.uk) for the area, which went live April 2014
- Researched and developed business tourism / conference marketing campaign to attract more business events to the area, due to launch January 2015
- Updated content, images and improved search engine optimisation on main Tourism Partnership website www.heartofdevon.com
- Held numerous competitions with regional press to raise the profile of Exeter & the Heart of Devon and to increase their consumer database
- Photographic competition held over the summer of 2014 to increase the number of events held by the Tourism Partnership
- Implemented the new Visit Devon approved accommodation inspection scheme, replacing the Heart of Devon scheme to promote a quality experience
- Contributed to Visit Devon PR activity and to support promotion of the Devon brand

11.12 The Economy & Tourism Manager of the City Council will take on the role as Chair of Visit Devon from April 2015. This is a fantastic opportunity to gain media exposure for the area, as the majority of the additional media engagements this will generate will take place in and around Exeter.

12 Priorities for 2015 – 16

12.1 The focus for 2015 – 2016 will be on delivering outstanding actions from the Exeter Visitor Strategy, developing the Exeter & the Heart of Devon Tourism Partnership further and paying particular emphasis on the promotion of Exeter & the Heart of Devon in the run up to Rugby World Cup 2015. Actions from the Exeter Visitor Strategy will continue to form part of the Economy Unit's annual work programme, to ensure delivery is met through the agreed timeframe. These are broken down into the five strategic priorities as follows:

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 supporting 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

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 & the Heart of Devon
- Research attraction passes in other destinations throughout the UK and the potential of introducing a pass to Exeter
- Investigate the potential to introduce 'meet & greet' ambassadors for day visiting coaches, guiding visitors to the information centre, attractions, shops and eating out venues
- In collaboration with the Exeter BID company, investigate the potential for Exeter to enter the national Purple Flag scheme www.purpleflag.org.uk

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 tourism and food & drink sector within the Heart of the South West Local Enterprise Partnership for Exeter and the Heart of Devon area
- 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 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

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
- Work with Exeter's twinning organisations to promote Exeter as a place to visit

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 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
- 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
- Work with the Board of Directors of 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

12.2 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 within section 4.

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

13.1 Having a vibrant visitor economy within Exeter contributes to 'Building a stronger sustainable city' and the main purpose of 'Help me run a successful business in Exeter'. The more people we have visiting Exeter, the more they will spend in the city to create and sustain long term year round employment.

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

14.1 There is the potential that income is not achieved through businesses choosing to become a member of the Tourism Partnership, thus reducing the level of marketing activity undertaken to promote the area. The target of increasing membership to 300 in 2014 has been achieved, a new target of 350 will be set for 2015.

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 focus of marketing activity in 2015 will be on events, local food & drink and activities - both indoor and outdoor. The 3 campaigns will be about encouraging residents and visitors to explore what there is to see and do within the area – especially cycling, walking and climbing – supporting Exeter’s aim to be the most active city in the South West by 2018.

15.2 Having a sustainable year round visitor economy will also support year round jobs for the residents of Exeter. Including the provision of flexible ‘entry level’ jobs for new employees or those finding it difficult to get back into work.

16. Are there any other options?

16.1 There is the option of not coordinating and taking a lead on marketing activity for Exeter and the Heart of Devon. This could potentially reduce the level of exposure gained for the city regionally and nationally and eventually reduce the number of people visiting and the amount spent in the city, thus reducing the number of jobs supported within the industry. The industry is particularly disparate and the success of the partnership approach here and elsewhere demonstrate the need for leadership provided by the joint public / private sector initiative.

Victoria Hatfield, Economy & Tourism Manager

Richard Ball, Assistant Director Economy

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

Background papers used in compiling this report:-

Exeter & the Heart of Devon visitor research 2014
Scrutiny Committee Resources – 13 November 2014

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

APPENDIX 1 - Progress made and outputs achieved made during 2014.

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 lead officer within City Council. Planning application expected late 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	Discussions with Exeter City Council's City Development and Devon County Council to ensure suitable provision is made available within the city for coach drop off/pick up and parking, as a result of the Bus Station development	Ongoing
Work with public transport providers to improve real time transport information at key points throughout the city	Interactive red monoliths installed in Princesshay, Sidwell Street and St Thomas with live links to transport and visitor information. Remainder of project put on hold due to up and coming developments within the Bus Station	Ongoing

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
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	Results of visitor research undertaken in 2014 to be distributed to businesses December 2014, to highlight areas needed for improvement Relevant award schemes promoted to businesses, encouraging them to apply	Too early to identify product development improvements by business, anticipated Spring. Record number of winners from Exeter & the Heart of Devon through the Devon Tourism Awards 2014

Work with existing heritage and cultural facilities within Exeter to improve the product and visitor experience, taking into account previous and planned research	Research undertaken in 2014 distributed to key organisations in the area, related around product improvements. Exeter Cultural Partnership established to improve culture offering within the city	Exeter Cultural Action plan produced. Grants for the Arts being submitted to implement actions from Cultural Action Plan
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	Walking trails promoted heavily through the 2014 activity campaign. Comprehensive listing on www.heartofdevon.com of walks available within the area and from key transport hubs	Website traffic to walking website pages increased by 55%
Work with Devon County Council on improvements to the national tourist brown signs scheme currently being reviewed by central government	Comments fed into national Brown Signs Task Force Review	Awaiting final report from Central Government
Research attraction passes in other destinations throughout the UK and the potential of introducing a pass to Exeter	Options for an Exeter Heritage Pass has been drawn up, implementation delayed	Rolled forward to 2015 – 16
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 is progressing on this action, linking with the RWC2015 city volunteers - Try Exeter	Rolled forward to 2015 – 16
Investigate the potential for Exeter to enter the national Purple Flag scheme www.purpleflag.org.uk	Business Improvement District (BID) to aim for Purple Flag status by the start of the RWC2015	To be picked up by the BID

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
Ensure that there is strong support for the local tourism and food & drink sector within the Heart of the South West Local Enterprise Partnership	Information provided to the HoSW LEP in terms of the value of tourism and jobs supported by visitor spend to try and secure their support	Awaiting response – follow up will be taken during 2015

<p>Work with the Exeter & the Heart of Devon Employment & Skills Board:</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 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>New project officer in post to drive forward projects and initiatives 2 training courses have been developed and external funding received.</p>	<p>Funding received to run 2 training courses Spring 2015:</p> <ul style="list-style-type: none"> • Training for hospitality and retail businesses • Training for people claiming JSA, related around RWC2015
<p>Investigate the provision of work trial, work experience within visitor facilities managed by Exeter City Council to raise skills and experience</p>	<p>The Economy unit has received 2 interns during 2014 to undertake promotional work for the area. Another 1 has been confirmed for 2015. Visitor Info & Tickets also received a Spanish intern for 4 months, potential to repeat in 2015</p>	<p>2 interns worked within Economy for 6 months each. As a result of some of their work, website traffic increased by over 100%</p>
<p>Develop a short training programme for taxi companies and their drivers to be ambassadors for the city</p>	<p>Training programme developed for front line staff in relation to RWC2015, funded through the LEP Local Response Fund and managed by Exeter & the Heart of Devon Employment & Skills Board</p>	<p>Funding received through the Local Response Fund to run training course in Spring 2015</p>

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

Action	Progress	Output
<p>Work with other key organisations to ensure that Exeter is seen as a 'film friendly' location</p>	<p>Film enquiries are dealt with on a reactive basis. Subject is the matter of a report to Economy Scrutiny Committee 22 January 2015</p>	<p>Rolled forward to 2015 – 16</p>

Promote Exeter & the Heart of Devon as a vibrant cultural short break destination, highlighting the City, Coast and Country offer	All visitor promotion through the Exeter & The Heart of Devon Tourism Partnership focuses on the city, coast and country. 2014 focused on cycling within the area due to the launch of the Exe Estuary Trail	Exeter and Exe Estuary Trail featured on Visit England website: https://www.visitengland.com/things-to-do/cycling Guardian website: http://www.theguardian.com/visit-england-cycling
Work with Exeter's twinning organisations to promote Exeter as a place to visit	Work will be brought under the umbrella of RWC2015 promotion through the Overseas Travel Agents (OTA's)	Ongoing

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	Tourist Information provided at key events held at Westpoint Arena, the Exeter Food Festival, Exeter Christmas Market and University of Exeter student open days Monthly PR issued through Visit Devon to national and regional press on major events held in Devon Focus of promotional activity for 2015 will be under the umbrella of 'Festival of Rugby'	A number of events within Exeter & the Heart of Devon featured on Guardian / Times / Telegraph / Daily Mail newspaper Events are the most popular pages on www.heartofdevon.com . Received 9,000 unique hits in one day, related to bonfire events
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	Across the Heart of Devon, public funding for TIC's is reducing. Very limited resource within the Tourism Partnership to set up a network across the area. Within the area 1 TIC has closed down and 2 have reduced services offered.	Best practice is shared across the network. Limited activity due to lack of resources from neighbouring authorities

Research and develop activity/adventure tourism to increase the awareness of what there is to see and do within the Heart of Devon	Activity (cycling) campaign launched Spring 2014 to promote a range of activities in the area, linking to the Exe Estuary Trail. Campaign will continue into 2015 to tie in with RWC2015	11 additional activity businesses joined Tourism Partnership. 6 journalist visits to the area, exposure gained in national and regional media / press
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	Visit Devon thematic campaigns stopped due to lack of budget. Focus of marketing activity is on PR and promoting www.visitdevon.co.uk	N/A
Develop and implement a group marketing campaign promoting Exeter and the Heart of Devon to group organisers	Group marketing ceased due to low level of return. Staff time and resource focused on business tourism and attracting more conferences and meetings to the area	Business tourism marketing plan developed. Implemented from Jan 2015 onwards
Work with the Board of Directors of Exeter & the Heart of Devon Tourism Partnership to ensure a sustainable financial footing for the Partnership	One Association withdrew grant funding for the Tourism Partnership during 2014 – due to closure. Initial drop in membership, but this has now increased due to new member sign ups	Self employed Membership Manager appointed to increase membership from 240 to 300. Membership now stands at 302
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	Focus of work during 2014 was on gaining detailed visitor research on Devon.	Cambridge Economic Activity Model, Visit England brand tracker research, Visit Devon visitor survey undertaken and final reports distributed
Commission a photographer to refresh the Exeter & the Heart of Devon photographic library	Local photographer commissioned spring 2014 to develop activity library for the area. Rokk Media commissioned to develop RWC iconic images	Approx. 40 new activity images gathered over summer 2014 10 RWC images produced of iconic places
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	Put on hold due to level of work now being undertaken as a result of RWC2015. This project will be developed with the new Try Exeter volunteers, as part of RWC2015	Rolled forward to 2015 – 16

Work with neighbouring destinations and local authorities to develop a Destination Management Plan to be recognised as a Destination Management Organisation	Put on hold due to level of work now being undertaken as a result of RWC2015	Rolled forward to 2015 – 16
--	--	-----------------------------

APPENDIX 2 - Tourism Performance Indicators

Tourism related Performance Indicators	2005	2006	2007	2008	2009	2010	2011 Baseline	2012	2013	2014 Jan - Nov
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	50,060
Number of accommodation bookings made in person at Exeter Visitor Information and Tickets	758	648	615	428	413	430	227	148	144	131
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	29,708
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	12,901
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	24,217
Number of visitors to the Underground Passages	18,459	Closed	4,753	19,863	18,896	19,517	20,554	19,768	20,439	20,484
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	218,676
Number of visitors to Exeter Cathedral	187,000	142,000	170,000	131,741	109,778	108,869	110,783	Awaiting data	Awaiting data	Awaiting data
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	Awaiting data
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	12,002
Exeter Corn Exchange ticket sales	5,335	3,551	7,398	8,396	8,314	13,784	20,003	23,352	27,110	28,378
Number of group bookings made through the Tourism Unit	334	363	445	500	486	425	597	462	476	486
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	454,879	455,072	450,401
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	159,718	196,661	423,047
Number of inbound visitors to Exeter	278,000	346,000	363,000	338,000	279,000	243,000	229,000	236,000	253,000	263,000

Airport										
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	1,368,857	753,480 (Jan – Jul)
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	1,894,540

APPENDIX 3 - Economic impact of tourism within Exeter

	2009	2010	2011 Baseline	2012	2013
Direct actual jobs	2,882	2,958	2,951	3,526	3,362
Indirect actual jobs	884	856	996	1,287	1,253
TOTAL ACTUAL JOBS	3,767	3,814	3,947	4,822	4,615
Bed spaces	6,703	7,401	7,625	7,765	7,867
Day visits	1,568,000	1,539,000	1,688,000	1,818,000	1,714,000
Day visitor expenditure	£79.5 million	£77.4 million	£62.3 million	£66.9 million	£63 million
Overnight trips	360,000	442,000	453,000	445,000	449,000
Overnight expenditure	£71.6 million	£81.1 million	£96.9 million	£119.6 million	£121.3 million
Other tourism expenditure	£8.6 million	£7.7 million	£8.0 million	£9.1 million	£6.9 million
TOTAL VISITOR TRIPS	1,928,000	1,981,000	2,141,000	2,263,000	2,163,000
TOTAL VISITOR EXPENDITURE	£159.7 million	£166.2 million	£167.2 million	£195.6 million	£191.2 million

Cambridge Economic Activity Model