

REPORT TO SCRUTINY COMMITTEE - ECONOMY

Date of Meeting: 10 September 2015

Report of: TOURISM FACILITIES PERFORMANCE REVIEW

Is this a Key Decision?

No

Is this an Executive or Council Function?

Executive

1. What is the report about?

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

2. Recommendations:

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

3. Reasons for the recommendation:

This is an annual report to update Members on the performance of these facilities and attractions.

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

Other than existing revenue budgets there are no resource implications.

5. Section 151 Officer comments:

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

6. What are the legal aspects?

None

7. Monitoring Officer's comments:

This report raises no issues to concern the Monitoring Officer

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. The Tourism Facilities are managed by the Visitor Facilities Officer reporting to the Events, Facilities and Markets Manager.

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

8.3 In recent years due to the customer facing nature of the facilities a number of additional tasks have been taken on whilst other areas within the Council (such as the Canal Office and The City Centre Manager) have been affected by restructuring.

8.4 The purpose of the tourism facilities is to assist in the delivery of the Exeter Visitor Strategy and the Council's stated purpose '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 Exeter Festival of South West Food & Drink.
- 9.3 Staff at EVIT have, since March 2015, been responsible for administering the booking of the banner sites throughout the City Centre, a role previously carried out by the City Centre Manager.
- 9.4 With the relocation of the canal office administrator into the Civic Centre, staff at EVIT have assisted with selling electricity cards to boat owners and issuing fishing permits.
- 9.5 This autumn EVIT will become one of the key exchange points for the Exeter Pound.
- 9.6 EVIT will act as a key information hub for the Rugby World Cup.
- 9.7 EVIT opens 6 days a week all year round and is staffed with 3.2 full time equivalents.
- 9.8 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. In the recent past there was a downward trend of people visiting the centre allowing the centre staff to devote time to enquiries made by different media. This trend appears to have slowed, probably as a result of the additional functions that the centre has taken on.
- 9.9 The Table below highlights how the centre has handled enquiries in recent years:

	2011/12	2012/13	2013/14	2014/15	Trend*
Number of visitors to EVIT	66,114	55,925	55,250	53,215	-8%
Number of other EVIT users (telephone/emails/letters)	23,650	28,085	32,637	34,741	+17%
Total number of enquiries handled by EVIT staff	89,764	84,010	87,887	87,956	+1%

* Trend - To calculate the trend the result for 2014/15 is compared to the average result over the four year period to show the percentage increase or decrease achieved in 2014/15.

- 9.10 In the current financial year the number of visitors to EVIT (until end of July) was 21,180 representing a 1% increase on the same period year. The number of other centre users was 14,450, a 35% increase on last year. Overall the number of users was 35,630, a 14% increase on last year.
- 9.11 The centre's box office facility activity continues to grow. EVIT acts as a ticket agent for theatres, shows and events throughout the area, including the Northcott Theatre, Corn Exchange, and Theatre Royal. EVIT also sells National Express tickets and coach tour tickets. EVIT gains an income through ticket sales commission. This year EVIT became an agent for 4 more suppliers, including a high profile event at West Point.

Below is a summary of ticket sales and resultant income over the past 5 years.

	2010/11	2011/12	2012/13	2013/14	2014/15	Trend*
Tickets Sold	3,462	4,787	4,327	5,653	4,411	-3%
Value of Sales	£67,000	£99,000	£75,000	£112,000	£113,000	+21%
Clients	13	27	25	25	29	+21%
Commission raised	£1,625	£5,960	£4,286	£5,339	£7,927	+58%

* Trend - To calculate the trend the result for 2014/15 is compared to the average result over the five year period to show the percentage increase or decrease achieved in 2014/15.

- 9.12 This year the Corn Exchange changed their box office system to Spektrix, this system is also used by many theatres in the local area, this will allow EVIT to provide greater flexibility in its ticketing services and afford the opportunity to provide a greater range of tickets for external organisations.
- 9.13 A great emphasis is placed on the need to provide a service of quality. A number of staff attended a special Customer Care training course that was focussed on the RWC. Customer satisfaction surveys carried out in 2014 help demonstrate that a high quality of service is being achieved - see appendix one.
- 9.14 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 £23,000 of advertising fees income for this year's guide. Using the experience gained from this and in previous years it is hoped that the staff will be able to improve upon this level of advertising fees for the 2016 guide.
- 9.15 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 £153,000 in 2010/12 to £127,000 for the current financial year. To operate within this reduced budget (and to maintain the level of service offered) there is an increasing emphasis on targeting increased income.
- 9.16 Income levels from retail sales have remained reasonably constant over the last 3 years. In the current financial year income from retail sales to the end of July is £6,200; this is a 21% increase on the same period last year. A primary reason for this is the sale of RWC merchandise
- 9.17 The Visitor Facilities Officer (VFO) is exploring a number of new initiatives to increase income, these include:
- Consideration of the introduction of booking fees for ticket sales
 - Seek to increase number of venues and events for ticket sales to take advantage of access to the Corn Exchange's Spektrix box office system
 - Introduction of City Centre left luggage facility
 - Development of a Book-a-Bike ahead scheme
 - Joint retail stock purchasing with RAMM, Cathedral and other attractions within the City
 - Development of the Book-a-Bed ahead scheme
 - Realising the income earning opportunities presented by the city centre banner sites.
- 9.18 The VFO will continue to explore opportunities to increase footfall to the centre, the RWC information hub and merchandising will hopefully lead to similar opportunities with Exeter

Chiefs and Exeter City Football Club. Other opportunities include greater use of the paved 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 to maintain the passages and to ensure that they are not allowed to deteriorate.

10.3 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 seven days a week in the peak season (June-September, and school holidays outside this period) and six days a 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 The Underground Passages have continued to perform well and the number of visitors and the amount of income earned has improved since re-opening in 2007. The table below shows income and visitors over the last seven financial years (since the passages were re-opened to the public):

	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	Trend
Visitors	18,737	18,505	19,854	20,553	19,937	20,688	21,497	+8%
Income	£64,000	£74,000	£67,000	£74,000	£71,000	£81,000	£83,000	+13%
Groups	102	92	86	100	76	100	87	-5%

Trend – To calculate the trend the result for 2014/15 is compared to the average result over the seven year period to show the percentage increase or decrease achieved in 2014/15.

10.7 To date in the current financial year the Underground Passages have welcomed 7,837 visitors (a 5% increase on last year), with a resultant income of £29,350 (a 3% increase on last year).

10.8 The emphasis of service provision at the Underground Passages is one of quality; In 2014 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 attraction continues to offer an enjoyable visit; most areas assessed were to good or very good quality standards with some that achieved excellence*".

- 10.9 The Passages were awarded a 'Certificate of Excellence' from Trip Advisor for the first time this year.
- 10.10 In 2014 visitor surveys were undertaken and the results were extremely positive, see appendix one.
- 10.11 A continuing challenge for the Underground Passages will be to reduce operational costs. Over the last years four years the revenue budget has been reduced by 14% from £96,000 in 2010 to £83,000 in 2015. The VFO is investigating ways to increase the number of visitors and so improve 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/CUSTOM HOUSE VISITOR CENTRE

- 11.1 The Quay House had operated as a visitor centre since 1988. The centre provided visitor information, historical interpretation about the Quayside and the Canal, alongside a small retail operation. The centre was open 7 days a week in the peak season (April -October) and at weekends for the rest of the year. It was staffed by 0.9 full time equivalents.
- 11.2 In April 2015 the Quay House Visitor Centre was closed and its replacement was opened in the Custom House. This move was made possible because the Exeter Canal & Quay Trust (ECQT) purchased the long term lease of the Custom House and felt that the building would be better used as a visitor centre.
- 11.3 The funding of a visitor centre is primarily through a grant from ECQT. The grant funding has been in place since 2008 with ECQT providing funds on a rolling three year agreement. The current arrangement was agreed this year and will run until 2018. The running costs of the Custom House Visitor Centre will be higher than those associated with the Quay House, however the additional costs will be meet by ECQT.
- 11.4 The Trust has agreed to provide £50,000 per annum to run the centre. Exeter City Council is providing £5,500 in 2015/16. The grant will be reviewed after a full year's operation when actual costs have been established.
- 11.5 The new centre has been fitted out with a new tourist information office, improved interpretation, museum displays and an audio visual presentation. This was made possible with a £40,000 capital grant from ECQT. In delivery of this project over 90% of the existing Quay House fixtures and fittings were recycled to keep costs to a minimum. It is hoped that in 2-3 years time that in partnership with ECQT that funding can be obtained from the Heritage Lottery for a full refurbishment of the Custom House to take place therefore providing a facility and visitor attraction of regional significance.
- 11.6 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.

11.7 The table below highlights the Quay Houses performance over the past 5 years:

	2010/11	2011/12	2012/13	2013/14	2014/15	Trend*
Visitor Numbers	22,951	26,423	25,742	24,732	25,131	+1%
Number of group bookings	146	282	230	206	207	-3%
Income	£2,450	£4,150	£3,630	£3,170	£3,570	+5%

Trend - To calculate the trend the result for 2014/15 is compared to the average result over the 5 year period to show the percentage increase or decrease achieved in 2014/15.

11.8 Since opening in April 2015, the new Custom House Visitor Centre has performed well attracting 12,300 visitors to date (a 3% increase on last year's Quay House figures) and obtaining an income of £2,745 (an increase of 81% on last year).

11.9 Income levels have exceeded expectations; there are a number of reasons for this:

- Improved ticketing for events
- Room Hire for functions
- Establishment of pop-up Art/Craft Galleries on which a commission is charged on all sales

The new centre offers a greater opportunity to generate income; the VFO is currently working on a charging structure for the facility.

11.10 Since 2013 the staff based at Quay House/Custom House have been responsible for co-ordinating the booking of the Transit Shed and Piazza Terracina for events. This service is more efficient than it had been in the past and is assisting in generating more vibrancy on the Quay. Last year the total number of bookings were 42 (29 in the Transit Shed and 13 on the Piazza). This year there are currently a total 52 bookings already confirmed (38 in the Transit Shed and 14 on the Piazza). The types of events are varied but include such events as street food markets, Jazz on the Quay and craft markets which are all extremely popular.

11.11 The emphasis of service delivery at the Quay House and now the Custom House is one of quality. Accreditation from the Visit England's Visitor Attraction Quality Assurance scheme will be sought later this year. The key findings of the Quay House Visitor Centre Visitor Satisfaction Survey are highlighted in appendix one.

11.12 A challenge for the Centre in the future is to increase the number of visitors. Recent new developments on the quayside and the increasing number of events taking place at the quayside should attract more visitors to the area as well as encouraging more event organisers to use the area.

11.13 The VFO has been involved with Future of Exeter Quay Task and Finish Group in which members, officers, quayside traders and other interested parties discussed how the product on the Quayside could be enhanced and developed to the benefit of all.

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 29 volunteer Red Coat guides, and are co-ordinated by the VFO.

12.3 The service offers a series of free public tours with a summer programme of 29 tours a week (17 different tours) and a winter tour programme of 16 tours a week (14 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. This year to celebrate the RWC coming to Exeter a special talk 'Sporting Exeter' has been developed which will take place during the period of the RWC.

12.5 The Table below highlights the performance of the service over the past 5 years:

	2010/11	2011/12	2012/13	2013/14	2014/15	Trend*
Visitor Numbers	14,628	15,202	14,048	14,863	13,880	-4%
Income	£7,637	£8,218	£7,531	£8,955	£8,177	0%
Number of Group Bookings	N/A	N/A	148	162	160	0%

Trend = To calculate the trend the result for 2014/15 is compared to the average result over the 5 year period to show the percentage increase or decrease achieved up to 2014/15.

12.6 In the financial year to date the Red Coat tours have attracted 5,500 visitors and have generated £2,700 in income.

12.7 The service is continually developing. This winter a training programme to train a new intake of guides will take place in order to maintain the number of active guides in order that the service can be delivered effectively.

12.8 The guides are very distinctive and are all proud to be ambassadors for the city. The quality of the service was recognised when they were awarded the 'Trip Advisor 2015 Certificate of Excellence'. This prestigious award places the Guided Tours in the top performing 10% of all businesses worldwide (as measured by Trip Advisor). This is the third year in a row that this award has been received.

12.9 In 2014 a visitor satisfaction survey measured visitors' opinions of the service and the results were very encouraging, these can be found at appendix one.

13 REVENUE BUDGETS

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

	EVIT	Underground Passages	Quay House Visitor Centre	Red Coat Guides
Budget (£)	126,610	86,780	3,670	7370
Actual Spend (£)	125,647	74,356	3,861	7118
% Variance	0%	-17%	+5%	-4%

13.2 The only budget that was slightly overspent was that for the Quay House Visitor Centre, however this was only marginally and the centre was operating on a much reduced budget compared to previous years. All other facilities were on target or showed a Nett underspend for the year.

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 council's commitment to equality and diversity. Information and 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 anything 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 Adcock – Visitor Facility Officer
David Lewis – Events, Facilities and Markets Manager

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

Background papers used in compiling this report:-

None

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Appendix One

Results from EVIT Visitor Satisfaction Surveys 2014

	Excellent	Good	Neither	Poor	Very Poor
Accessibility & Sign posts	35%	60%	5%	0%	0%
Customer Service	50%	48%	0%	0%	2%
Goods & Services	40%	60%	0%	0%	0%
Overall Impression	55%	40%	3%	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 45 surveys.

These results highlight that over 95% of respondents thought that in all aspects of service delivery the level was good or excellent.

Results from the Underground Passages Visitor Satisfaction Surveys 2014

	Excellent	Good	Neither	Poor	Very Poor
Accessibility & Sign posts	56%	35%	5%	4%	0%
Audio-visual presentation	57%	41%	2%	0%	0%
Customer service	70%	27%	3%	0%	0%
Interactive displays	55%	41%	4%	0%	0%
Interpretation displays	53%	46%	1%	0%	0%
Overall impression	75%	22%	2%	1%	0%
Speed of Service	70%	29%	1%	0%	0%
Tour Underground	80%	17%	2%	1%	0%

Results based on a sample size of 137 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 2014

	Excellent	Good	Neither	Poor	Very Poor
Accessibility & Sign posts	48%	44%	5%	0%	0%
Audio-visual presentation	65%	30%	5%	0%	0%
Customer service	72%	24%	4%	0%	0%
Goods & Services available	33%	63%	4%	0%	0%
Information available	62%	38%	0%	0%	0%
Interpretation displays	53%	47%	0%	0%	0%
Overall Impression	62%	38%	6%	0%	0%
Speed of Service	72%	24%	4%	0%	0%

Results based on a sample size of 28 surveys.

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

Results from Red Coat Guided Tours Visitor Satisfaction Surveys 2014

	Excellent	Good	Neither	Poor	Very Poor
Content of Tour	69%	29%	1%	1%	0%
Customer service	77%	20%	3%	0%	0%
Delivery of Tour	76%	21%	3%	1%	0%
Overall impression	76%	22%	2%	0%	0%
Sign posting	50%	40%	5%	5%	0%
Variety of tours on offer	76%	21%	3%	0%	0%

These results are based on a sample of 97 questionnaires.

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