

**REPORT TO: ECONOMY SCRUTINY COMMITTEE**  
**Date of Meeting: 21 January 2016**  
**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 for the final year of the Visitor Strategy.

2.2 Members agree a way forward to develop a new visitor strategy for Exeter, taking into account the newly emerged Exeter BID and the Exeter Cultural Partnership.

**3. Reasons for the recommendation:**

3.1 To inform members of the progress made with the existing Visitor Strategy and to develop a timeframe to research and consult with business on a new Visitor Strategy for the city.

**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.

<b>Tourism Unit Budget 2015 – 2016</b>	<b>Net</b>
Tourism Administration (staff and central re-charges)	£114,560
Tourism Marketing	£61,600
Heart of Devon Tourism Partnership (projected income)	£88,000
<b>Total</b>	<b>£264,100</b>

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

**5. Section 151 Officer comments:**

5.1 There are no additional financial implications contained in this report.

**6. What are the legal aspects?**

6.1 None identified.

**7. Monitoring Officer's comments:**

7.1 This report raises no issues of concern 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 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 the opening of John Lewis, Magdalen Chapter Hotel, Southernhay Hotel, Sandy Park re-development, opening of the Exe Estuary Trail and 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 and the hosting of the European Rugby 7s’ and the Rugby World Cup (RWC2015) in the city.
- 8.4 Future planned developments within Exeter will further improve the appeal of the city to the short break, day visitor and corporate market, these include the re-development of bus station site, the opening of IKEA, the Guildhall Shopping Centre re-development, proposals related to the Bike Shed Theatre, 1 more Premier Inn Hotel opening in the city centre, Kalender Hall developments and Exeter continuing to be a host for European Rugby 7s.

## 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 2015, against the priorities, is listed in Appendix 1. Below is a selection of achievements:
- Exeter hosted the European Rugby 7s for the first time

- Exeter was a Host City for RWC2015 (18 September – 31 October 2015)
- Record number of tourism businesses receiving awards locally, regionally and nationally
- 3 interns worked within Economy to assist in delivering of the strategy
- Funding received to run numerous training courses for RWC2015
- Exeter & the Heart of Devon featured in numerous national magazines and newspapers
- Membership manager appointed to increase number of Exeter & the Heart of Devon members
- Record increase in website traffic to [www.heartofdevon.com](http://www.heartofdevon.com)
- New website launched for the corporate market [www.conferencedevon.com](http://www.conferencedevon.com)

## 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 (2014), which can be seen below, it is estimated that tourism is worth in the region of £181.3 million annually to the Exeter economy. Some 4,100+ 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 2014 include:
- day visitor trips decreased by 1.07% to 1.6m
  - overnight trips increased by 0.22% 454,000
  - accommodation spend increased by 13.94% to £38.9m
  - spend by visitors shopping increased by 7.52% to £47.5m
  - spend by visitors on food & drink increased by 8.14% to £47.7m
  - spend by visitors on visiting attractions increased by 10.69% to £18.9m
  - total tourism spend has increased by 8.38% to £181.7m
  - total actual jobs supported by tourism spend has increased by 5.19% to 4,152
- 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 12 November 2015.

Exeter	2007	2008	2009	2010	2011 Baseline	2012	2013	2014
Type of spend	£ million	£ million	£ million	£ million	£ million	£ million	£million	£million
Accommodation	£26.9	£25.8	£25.1	£28.9	£34.1	£40.7	£41.3	£38.9
Shopping	£47.1	£49.2	£47.6	£47.2	£44.1	£50.7	£50.6	£47.5
Food & Drink	£44.8	£45.7	£44.6	£46.3	£44.1	£50.6	£49.4	£47.7
Attractions & Ent.	£17.1	£16.8	£16.4	£16.4	£17.0	£20.4	£20.1	£18.9

Travel	£18.4	£18.0	£17.5	£19.2	£19.9	£24.1	£22.9	£22.1
Visiting Friends & Relatives, boats, second homes	£11.3	£9.4	£8.5	£7.7	£8.0	£9.1	£6.9	£6.6
<b>TOTAL</b>	<b>£165.6</b>	<b>£164.9</b>	<b>£159.7</b>	<b>£166.2</b>	<b>£167.3</b>	<b>£195.6</b>	<b>£191.2</b>	<b>£181.7</b>
Total estimated Jobs (supported by spend)	4,004	4,111	3,767	3,898	3,947	4,823	4,615	4,152
Overnight trips	392,000	369,000	360,000	442,000	453,000	445,000	449,000	454,000
Day visitor trips	1,576,000	1,611,000	1,568,000	1,539,000	1,688,000	1,818,000	1,714,000	1,670,000

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 continued reduction in overnight stays emphasis the importance to promote Exeter more 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 £593.7million, supporting 14,927 jobs in the area as shown in the table below.

East Devon, Mid Devon & Teignbridge	2008	2009	2010	2011	2012	2013	2014
Type of spend	£m	£m	£m	£m	£m	£m	£m
Accomm	£94.9	£112.3	£91.6	£92.5	£105.3	£105.2	£96.3
Shopping	£80.9	£142.1	£134.7	£130.2	£139.4	£135.1	£128.7
Food & Drink	£166.4	£182.1	£173.1	£190.3	£205.7	£206.6	£198.4
Attractions & Ent.	£57.9	£64.9	£59.1	£67.4	£71.8	£71.4	£69.4
Travel	£75.7	£84.9	£78.5	£87.6	£98.4	£99.7	£80.5
Visiting Friends & Relatives, boats, second homes	£28.1	£25.8	£24.1	£23.8	£28.6	£21.7	£20.4
<b>TOTAL</b>	<b>£503.9</b>	<b>£612.1</b>	<b>£558.1</b>	<b>£591.8</b>	<b>£649.2</b>	<b>£639.7</b>	<b>£593.7</b>
Total estimated Jobs	15,124	16,192	14,800	15,145	17,377	16,824	14,927
Overnight trips	1,351,700	1,559,000	1,300,300	1,338,000	1,353,000	1,322,000	1,289,000
Day visitor trips	5,995,000	6,328,000	6,437,899	9,247,000	9,735,000	9,951,000	9,573,000

## 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 was one of the Host Cities for Rugby World Cup 2015 – which has been 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](http://www.heartofdevon.com/rugbyworldcup) which was a website dedicated to information relating to Exeter and the Rugby World Cup 2015.
- 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 December 2015, membership of the Tourism Partnership stands at 306, which includes accommodation, attractions, food & drink and activity providers based within the area. Each business pays an annual membership fee which contributes to promotional activities, with the main benefit being a website entry on [www.heartofdevon.com](http://www.heartofdevon.com) the table below shows the breakdown of where a member is located within Devon. The majority of members pay their membership fee in April 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.

	Members
Exeter	100
East Devon	88
Mid Devon	40
Teignbridge	41
English Riviera	9
North Devon	5
West Devon	8
South Hams	5
Plymouth	3
Devon	6
Somerset	1
<b>Total</b>	<b>306</b>

- 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.
- 11.7 The contract to manage media relations through Astley Media and online marketing through Rokk Media were both extended autumn 2014 for a further 12 months. The Tourism Partnership worked closely with both companies to improve and increase marketing activity by the Tourism Partnership, especially in the run up to RWC2015.
- 11.8 During the previous 24 months Rokk Media have been developing and improving the Tourism Partnership's website ([www.heartofdevon.com](http://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.

Comparing 2015 to 2014 (Jan-Nov), traffic to the website has performed beyond expectations:

- Unique visits to the website increased by 35.69% to 573,601

- Visits to the website increased by 72.88% to 1,012,102
- Page views increased by 402% 10,605,424
- Twitter followers increased by 33.49% to 12,389
- Facebook likes increased by 6.11% 6,473

11.10 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:

- Led in the promotion of Exeter as a Host City for RWC2015
- Re-designed [www.visitexeter.com](http://www.visitexeter.com) to be a one stop shop for all things Rugby World Cup 2015
- Produced rugby animation video produced to raise awareness of Exeter as a Host City for RWC2015
- Carried out ongoing monthly proactive and reactive media work through Astley Media, primarily related to RWC2015 launches
- Distributed bi-monthly e-newsletter to our visitor database (30k+)
- Segmented customer database (30k+) to undertake target marketing
- Built a new conference website ([www.conferencedevon.co.uk](http://www.conferencedevon.co.uk)) for the area
- Worked with the industry to promote the area to the corporate market
- Updated content, images and improved search engine optimisation on main Tourism Partnership website [www.heartofdevon.com](http://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
- Contributed to Visit Devon PR activity and to support promotion of the Devon brand
- Contributed to the South West Tourism Growth (Visit England campaign promoting the South west overseas), ensuring Exeter & the Heart of Devon is featured

11.11 The Economy & Tourism Manager of the City Council took on the role of Chair of Visit Devon from April 2015. A number of newspaper, radio and TV interviews have taken place primarily on lobbying issues affecting the industry within Devon, including 'The Gove Effect'.

11.12 The proposed Exeter & the Heart of Devon marketing campaign for 2016 is titled - 'Indulge, Enjoy, Play – the Heart of Devon Way'. The campaign will focus on the wide range of events happening within Exeter & the Heart of Devon during 2016, as well as activities that visitors and residents can participate in, such as walking and cycling. Each month new itineraries will focus on different areas, and different demographics whilst potentially incorporating the bigger events once they start happening. The campaign will also feature competitions that members can participate in, to receive additional marketing exposure. Due to marketing activity in 2015 focusing on Exeter, due to the city being a Host City for RWC2015, the surrounding coast and countryside will feature highly going forward.

## 12 Priorities for 2015 – 16

12.1 Over the previous 18 months, the Economy Unit lead on a wide range of RWC2015 activities, as a result of this a number of actions from the Visitor Strategy have been delayed. The focus for 2016 – 2017 will be on delivering these outstanding actions from the Exeter Visitor Strategy, developing the Exeter & the Heart of Devon Tourism Partnership to become the voice of the industry, continue to promote Exeter for rugby breaks in the run up to the city hosting the European Rugby 7s summer 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

- Promote the Guildhall Shopping Centre and the new Queen Street dining quarter
- 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
- Work with Exeter BID and the new 'Welcome Team' as the city's '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](http://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:

- 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 Unit's budget and staffing and the resources of the Exeter & the Heart of Devon Tourism Partnership, as shown within section 4.

12.3 Going forward senior management time is becoming less available to manage and work on the Tourism Partnership, this is due to pressing work commitments on economic

development and inward investment activities and projects. The board of the Exeter & the Heart of Devon Tourism Partnership have been advised to investigate alternative management options as a result of reduced staffing resources from the City Council.

### **13. Developing a new strategy for Exeter**

- 13.1 Rather than develop a new visitor strategy for Exeter, it is recommended to develop a hybrid Visitor Strategy / Destination Management Plan for the city. Visit England and central government encourages and supports destinations to develop a Destination Management Plan, as an essential tool in the delivery of a successful visitor economy. Any future plan for the city will need to be delivered from existing financial personnel resources.
- 13.2 A Destination Management Plan is a shared statement of intent to manage a destination over a period of time, articulating the roles of all stakeholders – such as the City Council, Devon County Council, Exeter BID, Exeter Cultural Partnership, The University of Exeter, Exeter Airport and the business community. Clear actions and resources will be identified to ensure the Plan is implemented. Having a Destination Management Plan will help to strengthen the Exeter & the Heart of Devon Tourism Partnership, in how it develops and evolves in the future.
- 13.3 It will be important to have a shared plan for Exeter, due to the development of a successful BID in the city centre and the appointment of a Cultural Director for the Exeter Cultural Partnership – we need to avoid fragmentation and duplication within Exeter. Work will commence on developing a new way forward for Exeter during summer 2016, following the key principles in developing a Destination Management Plan:
- Agreeing the plan together – Why we do this and who to involve?
  - Gathering the evidence – How well are we doing now?
  - Setting the direction – Where do we want to get to?
  - Identifying the action – What do we need to do to get there?
  - Measuring progress and keeping it going – Have we got there yet?

### **14. How does the decision contribute to the Council's Corporate Plan?**

- 14.1 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.

### **15. What risks are there and how can they be reduced?**

- 15.1 There is the potential income is not achieved through businesses choosing to become a member of the Exeter & the Heart of Devon Tourism Partnership, thus reducing the level of marketing activity undertaken to promote the area.

### **16. 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?**

- 16.1 The focus of marketing activity in 2015 will be on events and activities. The marketing campaign 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.
- 16.2 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.

**17. Are there any other options?**

17.1 There is the option of not coordinating and taking the 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**

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

**Background papers used in compiling this report:-**

**Exeter & the Heart of Devon visitor research – 12 November 2015**

Contact for enquires:  
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**APPENDIX 1 - Progress made and outputs achieved made during 2015.**

**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

<b>Action</b>	<b>Progress</b>	<b>Output</b>
Help to deliver sustainable mixed use development in Exeter through the production of a master plan for the development of Exeter Bus Station	Continued ongoing discussions with lead officer within City Council on the bus station and leisure development	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 visitor related businesses relocating or opening in Exeter to ensure they receive media exposure locally, regionally and nationally	Work continued with Astley Media, the Tourism Partnership PR agency to promote Exeter & the Heart of Devon to visiting journalists	During 2015 Exeter & the Heart of Devon has been featured in Kent Messenger, Sunday Mirror, Daily Star, Food & Travel Magazine and numerous national newspapers as a result of Exeter being a Host City for RWC2015

**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

<b>Action</b>	<b>Progress</b>	<b>Output</b>
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	Another record number of winners from Exeter & the Heart of Devon through the Devon Tourism Awards 2015. 11 gold, 11 silver and 8 bronze award winners. Through the South West Tourism Awards, businesses within Heart of Devon received 3 gold, 4 silver and 6 bronze. Through the national awards for

		excellence businesses received 1 gold and 1 highly commended
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	Due to working on RWC2015, this action is being rolled forward to 2016 – 17
Investigate the potential to introduce 'meet & greet' ambassadors for day visiting coaches, guiding visitors to the information centre, attractions, shops and eating out venues	RWC2015 city volunteers appointed to meet and greet rugby fans.	'Welcome Team' appointed by Exeter BID to meet and greet and assist visitors and residents of the city
In collaboration with the Exeter BID company, investigate the potential for Exeter to enter the national Purple Flag scheme <a href="http://www.purpleflag.org.uk">www.purpleflag.org.uk</a>	Business Improvement District (BID) to aim for Purple Flag status by the start of the RWC2015. To be picked up by Exeter BID	Action will be raised with recently appointed Exeter BID manager

**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	Limited response from LEP on tourism. Awaiting the results of the SWTGF to show the impact in promoting the SW area
Work with the Exeter & the Heart of Devon Employment & Skills Board: <ul style="list-style-type: none"> <li>○ to ensure new hospitality businesses are supported through the recruitment of new staff and ongoing staff development</li> <li>○ to assist tourism businesses to set up and support apprenticeships</li> <li>○ to bid for funding to support and help deliver leadership and management training for hospitality businesses</li> </ul>	Funding received from the HOSW LEP to run RWC2015 training courses for front line members of staff. Due to the success of the training programme, additional funding was achieved.	Information on attendees included in RWC2015 report to this committee

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

<b>Action</b>	<b>Progress</b>	<b>Output</b>
Work with other key organisations to ensure that Exeter is seen as a 'film friendly' location	Film enquiries are dealt with on a reactive basis. Subject is the matter of a report to Economy Scrutiny Committee 22 January 2015	Rolled forward to 2015 – 16
Work with Exeter's twinning organisations to promote Exeter as a place to visit	Attended 3 RWC2015 'meet the media' events, promoting Exeter for day and short breaks. Numerous overseas travel agents included Exeter in their itinerary	Contacts gained for future rugby related events to be held in Exeter. Italian Ambassador attended a RWC2015 in Exeter

**Priority 5 - Build on work already undertaken to further develop the Heart of Devon Tourism Partnership, to secure additional funding, implement additional marketing of the area and broaden its business development activities**

<b>Action</b>	<b>Progress</b>	<b>Output</b>
Work with the organisers of large scale events in the Heart of Devon (such as the Food & Drink, County Show, Folk and other Festivals) in the promotion of the event locally, regionally and nationally	Focus of promotional activity during 2015 was around RWC2015, the 3 matches held at Sandy park and the days Exeter Fanzone was open. PR issued through Visit Devon to national and regional press on major events held in Devon	The City gained a wide range of national and international exposure during 2015 as a result of being a RWC2015 Host City. Events continues to be the most popular pages on <a href="http://www.heartofdevon.com">www.heartofdevon.com</a>
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	Worked with Visit England and England 2015 promoting Exeter as a Host City for RWC2015. Funding received from DCLG to promote the SW overseas – South West Tourism Growth Fund (managed by Visit England). Information supplied on Exeter & the Heart	The City is gaining a wide range of national and international exposure as a result of the SWTGF campaign

	of Devon	
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	New business tourism website launched. Attended Confex exhibition with 3 city businesses, under the umbrella as a RWC2015 Host City. Marketing campaign rolled out to promote the area for business trips
Work with the Board of Directors of Exeter & the Heart of Devon Tourism Partnership to ensure a sustainable financial footing for the Partnership	Membership has remained the same during 2015, with some businesses withdrawing and some new businesses signing up for membership	Membership now stands at 302, proactive membership recruitment has temporarily been put on hold
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	Joint work continues on gaining detailed visitor research on Devon and Exeter & the Heart of Devon	Cambridge Economic Activity Model, Visit England brand tracker research, Gove Effect research undertaken and final reports distributed
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	Due to working on RWC2015, this action is being rolled forward to 2016 – 17
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	Due to working on RWC2015, this action is being rolled forward to 2016 – 17

## APPENDIX 2 - Tourism Performance Indicators

Tourism related Performance Indicators	2005	2006	2007	2008	2009	2010	2011 Baseline	2012	2013	2014	2015
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	52,625	53,379
Number of accommodation bookings made in person at Exeter Visitor Information and Tickets	758	648	615	428	413	430	227	148	144	131	99
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	32,409	40,931
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	13,273	13,182
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	24,644	26,910
Number of visitors to the Underground Passages	18,459	Closed	4,753	19,863	18,896	19,517	20,554	19,768	20,439	21,253	19,013
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	251,038	236,188
Number of visitors to Exeter Cathedral	187,000	142,000	170,000	131,741	109,778	108,869	110,783	1225,050	119,064	124,738	114,998
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	TBC	TBC
Number of visitors to Topsham Museum (Easter – Oct)	9,070	8,461	8,932	11,512	12,711	12,145	11,540	11,441	12,513	12,002	11,525
Exeter Corn Exchange ticket sales	5,335	3,551	7,398	8,396	8,314	13,784	20,003	23,352	27,110	26,885	33,448
Number of group bookings made through the Tourism Unit	334	363	445	500	486	425	597	462	476	395	354
Number of unique visitors to City Council website <a href="http://www.exeter.gov.uk/visiting">www.exeter.gov.uk/visiting</a>	33,087	30,312	Not know	Not known	Not known	196,456 (May-Dec)	223,033	454,879	455,072	229,289	163,125
Number of unique visitors to Tourism Partnership website <a href="http://www.heartofdevon.com">www.heartofdevon.com</a>	24,107	25,596	40,108	39,406	102,547	119,442	143,099	159,718	196,661	523,757	620,910
Number of inbound visitors to Exeter Airport	278,000	346,000	363,000	338,000	279,000	243,000	229,000	236,000	253,000	TBC	TBC

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	1,363,554	TBC
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	2,135,264	2,423,674

**APPENDIX 3 - Economic impact of tourism within Exeter**

	<b>2009</b>	<b>2010</b>	<b>2011 Baseline</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
Direct actual jobs	2,882	2,958	2,951	3,526	3,362	2,984
Indirect actual jobs	884	856	996	1,287	1,253	1,168
<b>TOTAL ACTUAL JOBS</b>	<b>3,767</b>	<b>3,814</b>	<b>3,947</b>	<b>4,822</b>	<b>4,615</b>	<b>4,155</b>
Bed spaces	6,703	7,401	7,625	7,765	7,867	7,987
Day visits	1,568,000	1,539,000	1,688,000	1,818,000	1,714,000	1,670,000
Day visitor expenditure	£79.5 million	£77.4 million	£62.3 million	£66.9 million	£63 million	£63 million
Overnight trips	360,000	442,000	453,000	445,000	449,000	454,000
Overnight expenditure	£71.6 million	£81.1 million	£96.9 million	£119.6 million	£121.3 million	£112.1 million
Other tourism expenditure	£8.6 million	£7.7 million	£8.0 million	£9.1 million	£6.9 million	£6.5 million
<b>TOTAL VISITOR TRIPS</b>	<b>1,928,000</b>	<b>1,981,000</b>	<b>2,141,000</b>	<b>2,263,000</b>	<b>2,163,000</b>	<b>2,124,000</b>
<b>TOTAL VISITOR EXPENDITURE</b>	<b>£159.7 million</b>	<b>£166.2 million</b>	<b>£167.2 million</b>	<b>£195.6 million</b>	<b>£191.2 million</b>	<b>£181.3 million</b>

Cambridge Economic Activity Model