

**EXETER CITY COUNCIL**  
**SCRUTINY COMMITTEE - ECONOMY**  
**12 MARCH 2009**

**UPDATE ON THE EXETER VISITOR/TOURISM STRATEGY 2007 - 2010**

**1.0 PURPOSE**

- 1.2 The purpose of this report is to update members on progress with implementation of the Exeter Visitor/Tourism Strategy 2007-2010.

**2.0 BACKGROUND**

- 2.1 Executive approved the Exeter Visitor/Tourism Strategy 2007-2010 on 13 March 2007 and implementation commenced April 2007.
- 2.2 The aim of the Strategy is to:-  
“further develop the city as a nationally recognised visitor destination in a sustainable manner, focussing on Exeter's strengths as the regional capital as a leading, cultural, heritage and shopping destination, in providing jobs and supporting businesses. The intention is to increase tourism activity by 15% within the lifetime of the strategy”.
- 2.3 The focus of the Strategy is on encouraging more short- break, day visitors and groups to the city and the area, thus increasing the level of tourist spend within Exeter. The appeal of the city has been increased since the adoption of the strategy for residents and visitors through the opening of Princesshay, the re-opening of St Nicolas's Priory and Exeter's Underground Passages and improvements to city centre pedestrian signage and the public realm. Developing the Royal Albert Memorial Museum and the Quayside will further improve the appeal of the city to the short break, day visitor and group markets.
- 2.4 Actions from the Visitor/Tourism Strategy form part of the Tourism Unit's annual work programme and 'Service Improvement Plan'.

**3.0 PROGRESS TO DATE**

- 3.1 The following four priorities were agreed in the Strategy and to be implemented in partnership with the tourism business community in the city and the Exeter & Essential Devon Tourism Partnership. A brief overview of outcomes and progress to date between the baseline year of 2005 and 2008, unless otherwise stated, is listed under each priority:

- 3.1.1 **Priority 1 - To build on Exeter's position as a year-round quality visitor destination** by developing in partnership a series of themed marketing campaigns to raise the profile of the city nationally, regionally and locally, aimed at increasing visitor numbers and spend.

Outcomes and progress to date:

- New tourism website ([www.exeterandessentialdevon.com](http://www.exeterandessentialdevon.com)) launched with online accommodation bookable facility, unique website hits increasing by 75%

- Increase in day visitors (5.5%) and expenditure (11.6%) to the city (between 2005 and 2007)
- Visits to friends and relatives within Exeter increased by 132% (between 2005 and 2007)
- Increase of 49% in group bookings made through Tourism Unit
- Annual Christmas campaign launched to include website, brochure, PR and advertising.

3.1.2 **Priority 2 - To raise the quality and competitiveness of the visitor experience in Exeter** by developing and improving city attractions, events and visitor services.

Outcomes and progress to date:

- Exeter Visitor Information & Tickets and Exeter's Underground Passages re-opened September 2007 in new premises within Princesshay development
- An increase of 21% in usage of Exeter Visitor Information & Tickets
- An increase of 33% in people attending a Red Coat Guided tour
- An increase of 11% in usage of the Quay House Visitor Centre
- An increase of 7% in visitor numbers of Exeter's Underground Passages
- All Exeter conference venues listed on [www.exeter.gov.uk/visiting](http://www.exeter.gov.uk/visiting)
- Exeter's Underground Passages achieved national 'Museum & Heritage' Highly Commended award
- St Nicholas Priory re-opened after major refurbishment
- Cricklepitt Mill opened and introduced into a number of Red Coat Guided tours
- Phase II of strategic signage installed by Planning and Engineering Services (spring 2009).

3.1.3 **Priority 3 - To maximise economic benefits and employment opportunities from tourism** by strengthening the partnership with the business community and supporting improvements and additions to the accommodation stock.

Outcomes and progress to date:

- Exeter & Essential Devon Tourism Partnership formed and directors appointed from 3 local tourism associations and current membership base
- Exeter Hotel Study produced Oct 2007 by The Tourism Company supporting the case for a growth in hotel bed stock
- Exeter Tourism Forum established
- Visit Devon (Destination Management Organisation) established
- Annual tourism/hospitality training programme developed in conjunction with Devon Tourism Skills Network and Devon County Council.

3.1.4 **Priority 4 - Improve the position of Exeter as a short break destination through sustainable tourism initiatives** by encouraging tourist facilities within Exeter to raise quality standards and to adopt a sustainable approach to tourism development.

Outcomes and progress to date:

- Public transport and Park & Ride highlighted in all tourism promotional literature and websites
- Car free days out itineraries available to download from [www.exeter.gov.uk/visiting](http://www.exeter.gov.uk/visiting) and [www.exeterandesentialdevon.com](http://www.exeterandesentialdevon.com)
- 11 businesses achieved Green Tourism Business Scheme during 2007 and 2008
- Brochures produced by the Tourism Unit printed on recycled paper
- All brochures produced by the Tourism Unit available to download as PDF's or as digital brochure from [www.exeter.gov.uk/visiting](http://www.exeter.gov.uk/visiting) and [www.exeterandesentialdevon.com](http://www.exeterandesentialdevon.com)

3.2 A full summary of progress made on delivering key outcomes, under each of the priorities, is given in Appendix 1 attached to this report.

#### **4.0 EXETER & ESSENTIAL DEVON TOURISM PARTNERSHIP**

4.1 Realising the tourism potential of the city goes hand in hand with exploiting opportunities presented within Exeter and the wider area. The key is to have a concerted effort to minimise duplication and maximise promotion through an integrated approach. Over the past two years the Tourism Unit has been working on developing the Exeter & Essential Devon Tourism Partnership, which broadly covers the areas of Exeter, East Devon, Mid Devon and Teignbridge.

4.2 Articles of Association and Memorandum of Association, along with a comprehensive business plan, have been developed for the Exeter & Essential Devon Tourism Partnership as the basis for the formation of a company limited by guarantee. A local solicitor has been appointed to advise on all legal matters relating to setting up and running the company. The company has been registered at Companies House (company number 4689320) with a board of directors being drawn from private and public sector funders and current members of the Tourism Partnership. Funders of the Tourism Partnership include Exeter City Council, Exeter & the Heart of Devon Hotels & Restaurants Association, Axe Valley Promotions and the Blackdown Hills Business Association.

4.3 Board meetings occur monthly and discuss current and future planned activities, along with joint projects to be undertaken with Visit Devon and other Tourism Partnerships within Devon. Work currently undertaken by the Tourism Partnership includes:

- Website development ([www.exeterandesentialdevon.com](http://www.exeterandesentialdevon.com))
- Business support activities
- Working with Visit Devon on the promotion of Devon nationally
- Destination marketing
- press and public relations
- journalist visits
- national advertising of destination, visitor guide and website
- brochure production and fulfilment - Exeter & Essential Devon Visitor Guide
- e-newsletters
- development of themed promotional campaigns

- 4.4 As of February 2008, the membership stands at 309, which covers mainly attractions and accommodation providers based within Exeter, East Devon, Mid Devon and Teignbridge. It is intended to grow the membership base substantially to cover food & drink, transport and retail organisations. A new joint membership scheme is also currently being developed in conjunction with Visit Devon, the county wide Destination Management Organisation. This will offer additional services over other regulatory bodies aimed at promoting and developing tourism.

## 5.0 CURRENT ECONOMIC CLIMATE

- 5.1 VisitBritain and the Tourism Alliance commissioned Deloitte in March 2008 to assess the 'Economic Case for the Visitor Economy' in Britain. The final report was published September 2008 and quantifies the economic contribution of the visitor economy in terms of both direct and indirect impacts. Future challenges for the visitor economy were stated as:
- 5.1.1 **Short term forecast growth** - domestic tourism spend in 2008 was set to be at best at a similar level to 2007. This stems from the impact of the expected economic slowdown on overall tourism spend.
- 5.1.2 **Long term forecast growth** - the tourism industry's overall economic impact, both direct and indirect, is forecast to be significantly larger in absolute terms - £188 billion by 2018, but will only account for a similar proportion of the overall UK economy as 2008, at just under 8%.
- 5.2 The above report was released before the dramatic change in the economic climate which has occurred within the UK and in the rest of the world. This change will have a direct impact on UK holiday makers buying patterns for the 2009 season, which is predicted to have a positive effect on UK domestic tourism.
- 5.3 From a recent South West Tourism 'How's Business Survey', large proportions of businesses within the Exeter & Essential Devon area are less optimistic for the future of the tourism industry, with levels of business extremely mixed. Future bookings for peak periods are holding up reasonably well, although there are indications that secondary spend (shopping and eating out) could be affected. It is also noticeable that business outside of the peak season has, in some cases, been unpredictable and very last minute.
- 5.4 The current economic climate and the fall of the pound against the euro will have a marked difference on people's buying decisions for their annual holiday(s). However, market research states that holidays are apparently still the number one priority for UK adults. This year is a great opportunity for Exeter & Essential Devon to market itself to the UK domestic market as an affordable destination for families and couples wanting a short break or longer holiday. The help with this, the 2009 Exeter & Essential Devon Visitor Guide is distributed nationwide and is advertised within several national magazines, newspapers and direct mail pieces. Approximately £18,000 has been committed to advertising the Visitor Guide which is also distributed within the UK Tourist Information Centre network. The main holiday brochure has been available for two months and is being requested in encouraging numbers. To date approximately 43,000 copies of the 2009 Visitor Guide have been distributed.

5.5 Work is also currently underway trying to ensure that the website ([www.exeterandessentialdevon.com](http://www.exeterandessentialdevon.com)) appears on internet search engines particularly for people searching for family holidays in the South West and Devon. A programme of E-Newsletters is being developed and will feature family related accommodation, attractions, events and places to eat within the area.

## 6.0 PERFORMANCE MONITORING

6.1 A set of key performance indicators were included in the Strategy as a basis for monitoring trends and the effectiveness of the actions, which are listed within Appendix 2. Figures for 2005 were taken as the baseline as the most recent information available at the time. A target to increase tourism activity (expenditure) by 15% over the lifetime of the Exeter Visitor/Tourism Strategy to 2010 was agreed. The Cambridge Economic Impact model indicates an increase in visitor spend of 3.7% in 2007, with variations from -5.4% to an increase of 27%, depending on the type of visitor to Exeter.

6.2 Facilities managed by the Tourism Unit have seen an increase in visitor numbers from 7% to 33%. This has been attributed to enhanced facilities, better promotion of each facility and the impact of holding special events.

6.3 The total number of people booking accommodation directly through the Information Centre has fallen, in line with the national trend and has been reducing for a number of years; resulting from an increase in the usage of mobile phones and people booking online before their visit to the area. However, the overall usage of the Information Centre has grown, helped by its much-improved position, signage and as a result of the number of groups which use its services.

6.4 The 'Cambridge Economic Impact Model' is commissioned every two years (by South West Tourism) to estimate the volume and value of tourism to the South West economy. Data is then extracted for the sub-regions, including Exeter. The model draws down data from United Kingdom Tourism Survey for domestic visitors, the International Passenger Survey and the England Leisure Day Visits Survey.

6.5 From the most recent Cambridge Economic Impact Model (2007), which can be seen in Appendix 3, it is estimated that tourism is worth in the region of £165.5 million annually to the Exeter economy, an increase of 3.7% from 2005. Some 4,059 jobs are supported within hotels, attractions, cultural venues, eating out venues and transport facilities within the city, an increase of 5.4%.

6.6 The main comparisons from 2005 to 2007 include:

- • Total actual jobs supported by tourism spend has increased by 5.4%
- • Spend from day visitors has increased by 11.6%
- • Spend from overnight stays has decreased by 5.4%,
- • Visits to friends and relatives has increased by 132%
- • The total amount of bed spaces within Exeter has increased by 11%
- • Total tourism spend has increased by 3.7%

6.7 The model has to be treated with some caution as, for example, in 2007 the accommodation sector in Exeter, had a very good year due to major construction schemes, Princesshay and other projects, with bedroom occupancy rates being very high. The Cambridge Model shows a decline in

overnight trips and expenditure in 2007, which goes against information provided by the industry.

- 6.8 The table below illustrates visitor expenditure in Exeter, per day and overnight trip:

	2005	2007	% + / -
Expenditure per day trip	£45.38	£48.03	5.8%
Expenditure per overnight trip	£207.76	£198.48	- 4.6%

Source: Cambridge Economic Impact Model

- 6.9 To help overcome this decline in overnights trips and expenditure the Exeter & Essential Devon Tourism Partnership, along with Visit Devon, are working to promote the area as summarised elsewhere in the report. The current substantial and planned investment in increasing the bed stock within the City will also boost the appeal of Exeter for overnight stays, mid week and weekend. New hotels or additional accommodation currently under development include Jurys Inn (160 beds), Barcelona (13 beds), Southgate (40 beds) and Premier Inn – St David`s (99 beds). Consents also exist for the St Anne`s Well Brewery and Dean Clarke House (Southernhay). Proposals are being worked up for new hotels at the Science Park, Sky Park and Thomas Hall – University.

## 7.0 PRIORITIES FOR 2009 - 10

- 7.1 Considerable investment is being made in the infrastructure of the city to increase the appeal of and to cater for visitors to the city. References have been made earlier to investment in the quality and range of bed stock and to the development of the museum, the opening of St Nicholas`s Priory, the Underground Passages and the tourism information facility.
- 7.2 From Appendix 1 you will see that a number of actions from the Strategy have already been completed, the focus for 2009 and 2010 will be on delivering outstanding actions from the Strategy, particularly relating to promotion of the city in light of the challenging national economic climate. These have been broken down into the four priority areas:

- 7.2.1 **Priority 1 - To build on Exeter's position as a year-round quality visitor destination** by developing in partnership a series of themed marketing campaigns to raise the profile of the city nationally, regionally and locally, aimed at increasing visitor numbers and spend.
- Through the Exeter & Essential Devon Tourism Partnership enhance national promotion of the area to the family market in light of the changing economic climate. Activities to include public relations, E-newsletters, journalist visits and themed promotional campaigns.
  - Work with Visit Devon to promote the area to the overseas market, primarily focusing on the development of web-based promotions, to include [www.cornwall-devon.com](http://www.cornwall-devon.com) (France, Germany and Netherlands), [www.mysouthwestengland.com](http://www.mysouthwestengland.com) (USA) and [www.suedwestengland.de](http://www.suedwestengland.de) (Germany).
  - Enhance the spring and winter shopping campaign, to include the new website [www.exetershopping.org.uk](http://www.exetershopping.org.uk), shopping and parking guide, public relations, advertising and direct mail.
  - Develop and improve existing pages on the website [www.exeterandessentialdevon.com](http://www.exeterandessentialdevon.com) to the:-
    - Group market
    - Conference market

- Overseas market

- 7.2.2 Priority 2 - To raise the quality and competitiveness of the visitor experience in Exeter by developing and improving city attractions, events and visitor services.
- Work on refreshing interpretation materials and the internal décor of the Quay House Visitor Centre
  - Apply for the 'Quality Assured Visitor Attraction' award for Exeter's Underground Passages and the Quay House Visitor Centre
  - Implement new opening hours for Exeter Visitor Information & Tickets
  - Review coverage and the effectiveness of brown tourist highway signs, in-conjunction with the relevant officer at Devon County Council
  - Work with Visit Devon to develop a new conference bureau for Devon, activities to include familiarisation visits, website development, production of a conference guide, public relations and direct mail
  - Work with the Devon Tourism Skills Network to provide relevant tourism training courses to improve local employment opportunities and skills
  - New Code of Practice launched for group related attractions, eating out venues and accommodation providers to sign up to, to improve customer service and access to group related facilities within the City.
- 7.2.3 Priority 3 - To maximise economic benefits and employment opportunities from tourism by strengthening the partnership with the business community and supporting improvements and additions to the accommodation stock.
- Develop strong working relations with new and expanded hotels within the City, to promote new facilities to the leisure and business market
  - New joint membership scheme launched for Visit Devon and the Exeter & Essential Devon Tourism Partnership to enable the Tourism Partnership to strengthen, improve engagement with the tourism industry and to increase high-level marketing of the area.
- 7.2.4 **Priority 4 - Improve the position of Exeter as a short break destination through sustainable tourism initiatives** by encouraging tourist facilities within Exeter to raise quality standards and to adopt a sustainable approach to tourism development.
- Campaign launched to encourage people to visit Exeter by public transport from the main transport hubs of the West Midlands and Home Counties
  - Information pack produced for tourism businesses on how to reduce waste and recycle more
  - Assist tourism related businesses in producing 'Environmental Management Plans' covering all green issues.
- 7.3 The above actions will be delivered through the annual Tourism Unit budget and the resources of the Tourism Partnership, as shown below. The re-development of the Quay House Visitor Centre will be delivered through the Council's capital programme.

## 8.0 FINANCIAL IMPLICATIONS

- 8.1 Council involvement and contribution towards delivering the Exeter Visitor/Tourism Strategy has been met from within existing financial resources as summarised in the table below.

<b>Tourism Unit Budget 2008-09</b>	<b>Net</b>
Tourism Administration	<b>£146,860</b>
Tourism Marketing	<b>£110,560</b>
Exeter Visitor Information & Tickets	<b>£159,400</b>
Exeter's Underground Passages	<b>£111,450</b>
Quay House Visitor Centre	<b>£45,750</b>
Red Coat Guides	<b>£18,670</b>
Exeter & Essential Devon Tourism Partnership	<b>£67,000</b>
<b>Total</b>	<b>£659,690</b>

## 9.0 RECOMMENDED that:

- 9.1 Members note the progress made with implementing the 2007-2010 Exeter Visitor/Tourism Strategy.

**RICHARD BALL**  
**HEAD OF ECONOMY AND TOURISM**

### **ECONOMY AND DEVELOPMENT DIRECTORATE**

**Local Government (Access to Information) Act 1985 (as amended)**

**Background papers used in compiling the report:**

1. Scrutiny Committee - Economy 18 January 2007



## APPENDIX 1

## EXETER VISITOR/TOURISM STRATEGY - ACTION PLAN PROGRESS

**Priority 1 - To build on Exeter's position as a year-round quality visitor destination** by developing in partnership a series of themed marketing campaigns to raise the profile of the city nationally, regionally and locally, aimed at increasing visitor numbers and spend.

REF	ACTION	OUTCOMES
1.1	Work with partners on the effective promotion of Exeter and the Heart of Devon to the short break and group market recognising the value of Devon as the brand but focusing on the product that is available in and around the city	Exeter & Essential Devon Tourism Partnership formed and directors appointed. New website and Visitor Guide launched. Working with Visit Devon on the promotion of the area to the short break market. Further work to be developed on short break marketing, due to changing economic climate.
1.2	Develop and deliver marketing plan for: <ul style="list-style-type: none"> <li>• Day visitor market</li> <li>• Group travel market</li> <li>• Visiting, friends and relatives (VFR)</li> <li>• Overseas market</li> </ul>	Increase in attendance at selected attractions in the city from 2005 to 2008: EVIT 21% Red Coat Guide 33% Quay House Visitor Centre 11% Underground Passages 7% Increase in day visitors (5.5%) and expenditure (11.6%) to the city Visits to friends and relatives increased by 132% Group bookings increased by 49% Overnight trips reduced by 0.7% Work to be developed on promoting the area to the overseas market, in conjunction with Visit Devon.
1.3	Develop themed marketing campaigns for the promotion of Exeter to the following markets and to develop a family of promotional material: <ul style="list-style-type: none"> <li>• Kids &amp; families</li> <li>• Heritage &amp; culture, including Heritage Open Days</li> <li>• Nature &amp; gardens</li> <li>• Activity holidays</li> <li>• Food &amp; drink</li> <li>• Luxury holidays</li> <li>• Shopping</li> </ul>	Increase in day visitors from 2005 to 2008 (5.5%) and expenditure (11.6%) to the city. Exeter Mini Guide expanded to include places to shop and food & drink establishments. Heritage Open Day event expanded year on year to include more venues. Shopping campaign launched Feb 2008. More of a focus to be placed on 'kids & families' marketing campaign due to changing economic climate.
1.4	Exploit web-based technologies to generate interest in Exeter and the Heart of Devon, and facilitate an increase in accommodation bookings	New website ( <a href="http://www.exeterandessentialdevon.com">www.exeterandessentialdevon.com</a> ) launched 2007 with online an accommodation bookable facility. Unique website hits increased by 75% from 2005 to 2008.

1.5	Enhance the group booking service provided by the Tourism Unit to include suitable attractions in Exeter (RAMM & Cathedral) and re-introduce the group privilege card	Group booking facility expanded to include Exeter Cathedral, RAMM and St Nicholas Priory. Increase of 49% in group bookings, from 2005 to 2008, made through Tourism Unit. Group Privilege Card launched December 2008 covering a wide range of high street and independent retailers.
1.6	Promote the growing reputation of the city as a 'culinary destination, including further developing the Exeter Festival of South West England Food and Drink and a food 'Safari' highlighting the value of buying local food and drink to new visitors and group operators regionally and nationally	Attendance at the Exeter Food Festival increased by more than 50% from 2005 to 2008. Exeter Mini Guide expanded to include food & drink establishments. Independent food trail, covering the surrounding area, to be developed for <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a>
1.7	Raise the profile of a year-round programme of cultural events to encourage out-of-season visitors and new audiences	Funding provided to Think Thank to produce monthly events guide for Exeter during 2007 and 2008. All events added to <a href="http://Exeter.gov.uk">Exeter.gov.uk</a> , <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a> , <a href="http://VisitDevon.co.uk">VisitDevon.co.uk</a> and <a href="http://EnjoyEngland.com">EnjoyEngland.com</a> . Themed events developed at Exeter Visitor Information & Tickets & Exeter's Underground Passages during winter season.
1.8	Build on and promote Christmas events and activities to ensure that Exeter is a competitive and attractive shopping and visitor destination during the pre Christmas period	Annual Christmas campaign implemented to include website, brochure, PR and advertising. Campaign for 2009 to be developed and to take into account anticipated changes in peoples spending habits.
1.9	Work with the retail sector to promote facilities within the city to attract new visitors, coordinated through the City Centre/Princesshay Centre Management team	New shopping website and promotional campaign launched Feb 2009.
1.10	Work with the RSPB, Forestry Commission, Environment Agency and Devon Wildlife Trust on the development and promotion of bird watching in and around Exeter and the Heart of Devon	Information on bird watching available on <a href="http://exeter.gov.uk">exeter.gov.uk</a> and <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a> . Journalist visiting Exeter Mar 2009 to feature Exeter in national newspaper. Further work to be developed on the co-ordination of promoting bird watching facilities.
1.11	Once a substantial part of the National Cycle Network route is completed around the Exe Estuary, exploit the potential of cycle tourism in Devon through regional and national marketing campaigns	New Exe Estuary cycle route featured in 2008 Exeter Mini Guide and on <a href="http://exeter.gov.uk">exeter.gov.uk</a> and <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a> . Cycle promotional campaign to be developed once route completed.

**Priority 2 - To raise the quality and competitiveness of the visitor experience in Exeter** by developing and improving city attractions, events and visitor services.

REF	ACTION	OUTCOMES
2.1	Work with developers on the fit out of the new Tourist Information Centre and Underground Passages Heritage Centre and plan for the opening to raise the profile amongst residents, visitors and businesses within Exeter	Exeter Visitor Information & Tickets and Exeter's Underground Passages opened Sept 2007 in new premises within Princesshay. Increase in visitor numbers EVIT 21% and UP 7%.
2.2	Work with the Leisure & Museums Service on the promotion and opening of St Nicholas Priory and the Royal Albert Memorial Museum as a must see visitor attraction	Assistance provided to Leisure & Museums for the re-opening of St Nicholas Priory, attraction now included in all promotional literature and <a href="http://exeter.gov.uk">exeter.gov.uk</a> and <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a> . Further work to be progressed once RAMM re-opens.
2.3	Work with Community & Environment on the promotion and regeneration of the heritage parks in Exeter (Northernhay & Rougemont)	Main city parks and gardens included in the Exeter Mini Guide, <a href="http://exeter.gov.uk">exeter.gov.uk</a> and <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a> .
2.4	Encourage the development of better conference facilities within Exeter and the promotion of Exeter as a business tourism destination through Conference Devon	All Exeter venues that provide conference facilities listed free of charge on <a href="http://exeter.gov.uk">exeter.gov.uk</a> Work with Visit Devon to develop a new conference bureau for Devon, ensuring Exeter and Essential Devon conference venues are represented.
2.5	Ensure that all attractions managed by the Tourism Unit and within Exeter meet the minimum standards required for achieving the 'Quality Assured Visitor Attraction' award	Award achieved for reaching the 'National Minimum' visitor attraction standards for the Quay House Visitor Centre, Red Coat Guides and Underground Passages. 'Quality Assured Visitor Attraction' award to be applied for Summer 2009.
2.6	Promote the network of accessible cycle routes within Exeter to encourage residents and visitors of all abilities to cycle within and to the city	Tourism Unit consulted on the new Cycle Exeter leaflet, which is available to order through <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a> and available to pick up from Exeter Visitor Information & Tickets.
2.7	Work with City Centre Manager in encouraging later closing times and Sunday opening within the City Centre, linking to Princesshay opening	Exeter's Underground Passages re-opened with extended opening hours. Exeter Visitor Information & Tickets researching extended opening hours to 6pm.
2.8	Work with the Devon Wildlife Trust following the opening of Cricklepit Mill to enhance the tourism product on the Historic Quayside	Cricklepit Mill included in Exeter Mini Guide and <a href="http://exeter.gov.uk">exeter.gov.uk</a> . Mill included and visited on a Red Coat Guided tour.
2.9	Improve highway brown signage and pedestrian signage to visitor attractions and the Tourist Information Centre	Updated report to be published summer 2009 on improving brown highway signs into and around Exeter.

2.10	Research the opportunity to provide high quality banners advertising cultural events/activities as a means of promoting them at key locations in the city.	Report published by City Marketing team 2005. Updated report to be published on banners at key gateway locations into Exeter summer 2009.
2.11	Establish consultation mechanisms with both users and non-users of the tourism service including minority groups to establish future areas of tourism development and marketing opportunities	Equality Impact Assessment form completed on Tourism Strategy. Work undertaken with the Policy Unit on improving access to Tourism facilities and improving access to the promotional material we produce. Exeter Tourism Forum established July 2007 to consult with local industry representatives on tourism related issues.

**Priority 3 - To maximise economic benefits and employment opportunities from tourism** by strengthening the partnership with the business community and supporting improvements and additions to the accommodation stock.

REF	ACTION	OUTCOMES
3.1	Agree a strategic approach to the development of the Heart of Devon Tourism Partnership to:- a) encourage the wider tourism and business community to take part within the Heart of Devon Tourism Partnership b) develop an attractive membership structure in conjunction with the Devon DMO & South West Tourism c) develop an effective means of delivery for the promotion and product development of tourism within Exeter & Essential Devon including reaching minority groups.	Exeter & Essential Devon Tourism Partnership formed. Current membership total at 309. Board directors appointed from 3 local tourism associations and current membership base. New membership scheme being developed with Visit Devon, due to launch in April 2009.
3.2	Consider the results of the review to clarify the nature and scale of additional hotel accommodation needed and prepare policy guidelines relating to preferred locations for such developments in collaboration with neighbouring authorities	Exeter Hotel Study produced Oct 2007 by The Tourism Company, in partnership with East Devon District Council.
3.3	Determine whether involvement in a Devon wide Destination Management Organisation approach provides a realistic benefit for the area	Visit Devon (DMO) established Apr 2008 with CEO and support staff appointed. ECC contribute £2,800 per annum to running of Visit Devon. Representative from Exeter & Essential Devon (Head of Economy & Tourism) sits on the board of Visit Devon to ensure area is fairly represented in all promotional materials and other activities.

3.4	Work with the retail sector to build on opportunities provided by the new Princesshay development to attract new visitors to the city	New shopping website and promotional campaign launched Feb 2009.
3.5	Develop Exeter Tourism Forum to improve two way communication with the private sector of tourism development and marketing initiatives	Exeter Tourism Forum established Nov 2007 with Terms of Reference. Meetings well attended by a wide range of tourism related businesses.
3.6	Work with Devon Tourism Skills Network on developing an effective training programme for tourism businesses within Exeter and the Heart of Devon to cover a wide range of training needs, including equalities and access issues	Annual tourism/hospitality training programme developed in conjunction with Devon Tourism Skills Network. Numbers tbc from DCC (Jennifer Brogan).

**Priority 4 - Improve the position of Exeter as a short break destination through sustainable tourism initiatives** by encouraging tourist facilities within Exeter to raise quality standards and to adopt a sustainable approach to tourism development.

REF	ACTION	OUTCOMES
4.1	Develop the profile of Exeter as a centre for sustainable tourism by highlighting the ease of access by public transport to the city through rail and coach packages, and for day trips in conjunction with promoting walking the Jurassic Coast, Dartmoor etc, using the National Cycle Network and other initiatives.	Public transport facilities highlighted in all tourism promotional literature, exeter.gov.uk and exeterandessentialdevon.com. Car free days out itineraries developed and available to download from exeter.gov.uk and exeterandessentialdevon.com.
4.2	Continue to develop tourism without traffic (car free days out) to and from Exeter to encourage people to visit Exeter by public transport, linking with the Park & Ride	Car free days out itineraries developed and available to download from various tourism websites. Park & Ride highlighted in all tourism promotional literature and related tourism websites. Campaign launched spring 2009 to encourage people to visit Exeter by public transport from the main transport hubs of the West Midlands and Home Counties.
4.3	Develop a 'Code of Practice' for the groups/coach market visiting Exeter and to improve the provision of coach parking, coach facilities and coach driver refreshment facilities	Group operators surveyed during 2007, results will inform Code of Practice, to be developed summer 2009.
4.4	Provide guidance for small businesses on how to reduce waste and recycle more effectively and work towards implementing Environmental Management plans	Information pack to be produced summer 2009. 2 best practice 'Environmental Management Plans' to be developed covering green issues and how to reduce waste summer 2009.

4.5	Promote the Green Tourism Business Scheme (GTBS) to tourism providers within Exeter	11 businesses achieved GTBS during 2007 and 2008, with 2 businesses awaiting inspection.
4.6	Aim to reduce the amount of printed material produced by the Tourism Unit and capitalise on new ways to deliver tourist information to visitors and non-visitors through ICT	Over 75% of brochures produced by the Tourism Unit are printed on recycled paper. All brochures produced by the Tourism Unit are available to download as PDF's or as digital brochure from <a href="http://exeter.gov.uk">exeter.gov.uk</a> and <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a>
4.7	Encourage hotels, restaurants and cafes to highlight the linkages between their product and the sources of supply of the food, drink and other aspects of their operation with emphasis to be placed on sourcing local produce and Fairtrade products	Directory published listing venues that sell or serve Fairtrade products. Devon seasonal recipes available to download from <a href="http://exeterandessentialdevon.com">exeterandessentialdevon.com</a>

## APPENDIX 2

## Tourism Performance Indicators

Tourism Performance Indicators related to the above actions	2005	2006	2007	2008	% + / - from 2005
Number of visitors to the Tourist Information Centre <b>Comment:</b> September 2007 the TIC moved to its new prominent permanent location within the Princesshay development.	87,955	72,899	74,800	106,234	21%
Number of accomm. bookings made in the Tourist Information Centre <b>Comment:</b> The trend nationally is that the amount of accomm. bookings are decreasing due to an increase in mobile phone and internet usage.	758	648	615	428	-77%
Number of visitors on a Red Coat Guided Tour <b>Comment:</b> Improved regional advertising and wider distribution of Red Coat Guide leaflet. 2008 was also the 20 <sup>th</sup> anniversary of the Red Coat Guides.	12,912	14,617	18,114	17,204	33%
Number of Visitors to the Quay House Visitor Centre <b>Comment:</b> New leaflet produced to highlight what there is to see and do on the Historic Quayside and included in a broader range of publications.	23,471	26,048	24,561	26,123	11%
Number of visitors to the Underground Passages <b>Comment:</b> Newly opened heritage centre within Princesshay with a prominent location and increased promotion of the attraction locally and regionally.	18,459	Closed	4,753	19,863	7%
Number of visitors to the Royal Albert Memorial Museum <b>Comment:</b> National touring Leonardo exhibition held at RAMM during 2006, resulting in a large increase in visitor numbers.	233,408	247,000	192,025	Closed	-21%
Number of visitors to Exeter Cathedral <b>Comment:</b> Until 2008 Exeter Cathedral estimated how many people visited the Cathedral, 2008 saw the introduction of an admission fee.	187,000	142,000	170,000	131,741	-41%
Unique website visitors - <a href="http://www.exeter.gov.uk/visiting">www.exeter.gov.uk/visiting</a> <b>Comment:</b> Figures regarding unique visitors to the City Council website have been patchy and sporadic over the past 4 years, no data available for 2007 and 2008.	33,087	30,312	Not known	Not known	N/A
Unique website visitors - <a href="http://www.exeterandessentialdevon.com">www.exeterandessentialdevon.com</a> <b>Comment:</b> The website has been developed and edited to improve its chance of being found by internet search engines.	24,107	28,596	40,508	42,258	75%
Total group bookings made through the Tourism Unit <b>Comment:</b> Group bookings have increased due to improved and increased promotion of the group booking service provided by the Tourism Unit.	334	363	445	500	49%

## APPENDIX 3

## Cambridge Economic Impact Model

## Economic impact of tourism within Exeter

	2005	2007	% + / -
Direct actual jobs	2,927	3,119	<b>6.5%</b>
Indirect actual jobs	923	940	<b>1.9%</b>
<b>TOTAL ACTUAL jobs</b>	<b>3,850</b>	<b>4,059</b>	<b>5.4%</b>
Day visits	1,494,000	1,576,000	<b>5.5%</b>
Day visitor expenditure	£67.8 million	£75.7 million	<b>11.6%</b>
Overnight trips	399,000	396,000	<b>- 0.7%</b>
Overnight trips expenditure	£82.9 million	£78.6 million	<b>- 5.4%</b>
Visits to friends & relatives	88,000	204,000	<b>132%</b>
Other tourism expenditure	£8.8 million	£11.2 million	<b>27%</b>
Bed spaces	5,881	6,539	<b>11%</b>
<b>TOTAL TOURISM EXPENDITURE</b>	<b>£159.5 million</b>	<b>£165.5 million</b>	<b>3.7%</b>

Source: South West Tourism