Exeter City Council

PLACE SCRUTINY COMMITTEE

Date: Thursday 9 March 2017
Time: 5.30 pm
Venue: Rennes Room, Civic Centre, Paris Street, Exeter

Members are invited to attend the above meeting to consider the items of business.

If you have an enquiry regarding any items on this agenda, please contact Sharon Sissons, Democratic Services Officer (Committees) on 01392 265115.

Entry to the Civic Centre can be gained through the Customer Service Centre, Paris Street.

Membership -
Councillors Brimble (Chair), Lyons (Deputy Chair), Foggin, D Henson, Keen, Mitchell, Prowse, Robson, Wardle and Wood

Agenda

Part I: Items suggested for discussion with the press and public present

1 **Apologies**

To receive apologies for absence from Committee members.

2 **Minutes**

To sign the minutes of the meeting held on 12 January 2017.

3 **Declaration of Interests**

Councillors are reminded of the need to declare any disclosable pecuniary interests that relate to business on the agenda and which have not already been included in the register of interests, before any discussion takes place on the item. Unless the interest is sensitive, you must also disclose the nature of the interest. In accordance with the Council's Code of Conduct, you must then leave the room and must not participate in any further discussion of the item. Councillors requiring clarification should seek the advice of the Monitoring Officer prior to the day of the meeting.

4 **Local Government (Access to Information) Act 1985 - Exclusion of Press and Public**

It is considered that the Committee would be unlikely to exclude the press and public during consideration of the items on this agenda, but if it should wish to do so, the following resolution should be passed:-

RECOMMENDED that, under Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting of the particular item(s) on the grounds that it (they) involve(s) the likely disclosure of exempt information as defined in the relevant paragraphs of Part I of Schedule 12A of the Act.

5 **Questions from the Public under Standing Order 19**

Details of questions should be notified to the Corporate Manager Democratic and Civic Support at least three working days prior to the meeting. Further information and a copy of the procedure are available from Democratic Services (Committees) (Tel: 01392 265115) and also on the Council web site - www.exeter.gov.uk/decisions.

6 **Questions from Members of the Council under Standing Order 20**

To receive questions from Members of the Council to appropriate Portfolio Holders.

PRESENTATION

7 **Exeter City Futures - Exeter Energy Independence 2025**

To receive a presentation from Laurence Oakes-Ash - Head of Finance Exeter City Futures with details of the roadmap to city scale Energy Independence. (Pages 5 - 12)

(A copy of the Executive Summary relating to the Exeter Energy Independence report by Exeter City Futures report is attached).

ITEMS FOR CONSIDERATION BY THE EXECUTIVE

8 **Development of a New Brand - Visit Exeter**

To consider the report of the Tourism & Sport Manager. (Pages 13 - 106)

9 **Parking Tariffs**

To consider the report of the Service Manager Community Safety & Enforcement. (Pages 107 - 120)

ITEMS FOR DISCUSSION

10 **Budget Monitoring (Third Quarter)**

To receive a report of the Assistant Director Finance. (Pages 121 - 132)

ITEMS FOR INFORMATION ONLY

11 **Legacy Leisure Working Group Minutes 21 February 2017**

To receive the minutes of the meeting held on 21 February 2017. (Pages 133 - 136)

Date of Next Meeting

The next scheduled meeting of the Place Scrutiny Committee will be held on **Thursday** 8 June 2017 at 5.30 pm in the Civic Centre.

Find out more about Exeter City Council services by looking at our web site *http://www.exeter.gov.uk.* This will give you the dates of all future Committee meetings and tell you how you can ask a question at a Scrutiny Committee meeting. Alternatively, contact the Democratic Services Officer (Committees) on (01392) 265107 for further information.

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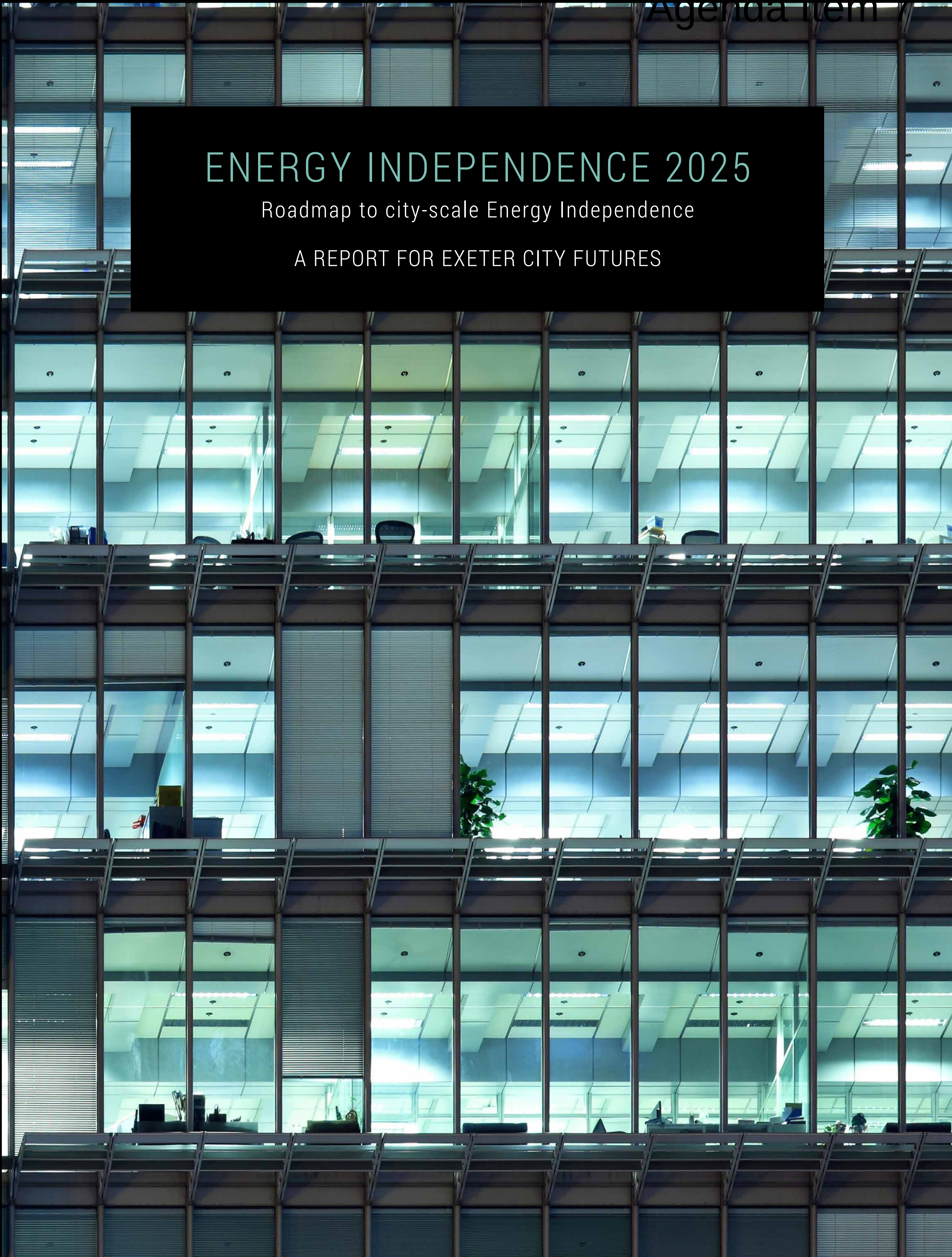
Agenda Item 7



ENERGY INDEPENDENCE 2025

Roadmap to city-scale Energy Independence

A REPORT FOR EXETER CITY FUTURES

CITY SCIENCE
endless possibilities

EXETER CityFutures

ACKNOWLEDGEMENTS

CITY SCIENCE WOULD LIKE TO THANK THE LEAD AUTHORS FOR THEIR CONTRIBUTION TO THIS REPORT:

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City Science would like to extend their gratitude to other contributors from Ricardo Energy & Environment who included: Ben Kiff, Colin McNaught, Louise Evans, Mike Morrell, Naser Odeh, Nigel Griffiths, Raphael Sibille, Simon Morris, Susan O'Brien, Eugenia Bonifazi and Kevin Bowe.

EXECUTIVE SUMMARY

Cities and the unprecedented growth of urban environments present both the greatest challenge and opportunity of our lifetime. As drivers of economic growth, cities are essential to modern life. But unsustainable trends in energy use, congestion and associated negative consequences threaten their health and the health of their residents and workers. Exeter City Futures has commissioned a series of three reports to examine the potential options and roadmaps that would enable Greater Exeter to develop a path towards a sustainable future. The stated goal of Exeter City Futures - an energy independent and congestion-free city region by 2025 - is without precedent in the UK.

Robust evidence is required to demonstrate whether this ambition is achievable and, if successful, what its economic impact might be. This first report undertakes a detailed assessment of potential energy resources and uses in Greater Exeter and across the wider South West region. The second report assesses the transport situation and the options available to alleviate congestion and deliver further efficiency. The final report pulls together economic evidence to provide an independent analysis of the impact of the programme's goals and proposed delivery plans.

This report examines the current energy consumption profile for Greater Exeter across domestic, industrial, commercial and transport sectors and develops three potential scenarios for the 2025 reference year. The first scenario, Business As Usual, projects 2025 energy consumption based on forecast growth rates. Potential energy demand reduction and energy generation measures are then explored in detail across a range of technologies and settings. In each case political, financial, social and other non-physical or landscape constraints are initially set aside in order to ambitiously assess overall resource availability. This Maximum Technology scenario demonstrates what is possible if current barriers can be overcome. These barriers are then discussed in detail for each technology and further major constraints applied to identified onshore generation measures. This produces the Maximum Deployment scenario which is then compared to the Business As Usual projection to determine the extent to which Exeter City Futures' energy independence target can be realised. A series of recommendations, governed by identified barriers, that would unlock the path towards the desired ambition are then presented.

By 2025, annual energy consumption in Greater Exeter is expected to grow to 11.3 TWh from the current 10.0 TWh. This is predominantly due to forecast household and business growth and the associated increase in transportation demand. Excluding transportation, it is anticipated that 2.6 TWh of demand reduction is possible. This estimate is based largely on reductions in domestic space heating demand. For existing properties, the installation of an ambitious suite of retrofit energy efficiency measures (including insulation and electrification of heat using heat pumps) would reduce demand by an estimated 1.8 TWh/year (60%). Tightening building regulations to Passivhaus standards and adopting heat pumps for the additional 29,600 properties expected by 2025 would limit energy consumption by a further 161 GWh compared with the Business As Usual scenario. A further 104 GWh could be saved in the domestic sector through upgrading appliances to the most efficient models.

Commercial demand is currently responsible for 1.3 TWh (13%) of energy consumption, forecast to increase to 1.5 TWh by 2025 at current sector growth rates. The variety of commercial businesses and building types means there are wide variations in energy end uses. Space heating, as in the domestic sector, is thought to represent a significant level of demand (36%), with lighting being the next largest end use (27%). Building fabric efficiency retrofit measures, similar to those applied in the domestic sector, would address space and water heating and lighting energy use. However several sector-specific issues would also need to be addressed, for example, refrigeration in supermarkets. Based on available data, a saving of 359 GWh is estimated to be achievable with the net resultant demand 9% lower than 2014 levels.

Industrial demand is responsible for 1.6 TWh (16%) of current energy consumption. As in the commercial sector, patterns of energy consumption vary significantly according to the the type of industry. Consequently, potential energy savings are highly sensitive to the mix of industries in the region and the specific operational processes in each. For example, 2020 carbon reduction targets set under the Climate Change Agreements for different industrial sectors range from about 5% for non-metallic minerals (cement, ceramics, glass) to 11.3% for chemicals, to about 15% for food and drink. Several assessments have been produced at national level which identify efficiency roadmaps on a sector-by-sector basis, developed from detailed work involving specialists in their respective sectors. This report suggests that Greater Exeter could reduce industrial energy consumption by 250 GWh (16% of industrial demand) by 2025, in line with national studies.

Greater Exeter has access to abundant natural energy resources due to its position in the South West. Analysis indicates that 153 TWh/year of unconstrained low carbon energy resource remains untapped in the region, comprised mostly of solar (111.1 TWh) and wind (41.6 TWh). A geothermal hotspot with an energy potential of 139.0 TWh per year is believed to extend through much of Cornwall and Dartmoor National Park and into the western fringe of the study area. Further assessment would be required to quantify to what extent this could be exploited for use in Greater Exeter. After applying major constraints such as those entailed by sensitive landscape designations, radar areas, urban development and roads it is estimated that the Maximum Technology Potential, i.e. the potential energy which could be captured, is 16 TWh.

Comparing the anticipated 2025 Business As Usual energy demand of 11.3 TWh with the Maximum Technology potential of 2.6 TWh of demand reduction and 16.0 TWh of new generation suggests that energy independence at regional level is possible. However, the inclusion of further non-physical constraints, in particular those associated with cumulative visual impact, means that the Maximum Deployment scenario is expected to be limited to 6.5 TWh, due principally to removal of onshore wind generation potential. Considering only the Greater Exeter area, this constraint results in a residual energy requirement of 4.8 TWh per annum from 2025 onwards. This estimate of residual energy requirement is pessimistic in that it does not include any energy saving potential from the 4.4 TWh annual transport demand anticipated by 2025, which is the focus of another report. It also excludes potential technology efficiency improvements, such as in solar cells. Energy from other large regional sources, such as the Alderney tidal stream interconnector that is proposed to land in East Devon, is also excluded from the analysis as it originates from outside the Greater Exeter boundary.

The barriers that must be overcome to achieve both proposed energy savings and new generation are significant and are reviewed in detail throughout this report. Political barriers, particularly in relation to planning consent, are likely to have the greatest impact on the region's ability to achieve energy independence. Planning policy related to local generation, particularly approaches to cumulative impact of large-scale installations, removes 12.1 TWh of potential generation between the Maximum Technology and Maximum Deployment scenarios in this analysis. For example, cumulative impact policies materially affect the available onshore wind resource, which could range from 157 GWh, when cumulative impact is assumed to be based on a 15 km offset between each 10 MW wind farm, to 1,479 GWh, when a 5 km offset is assumed. It is also likely that cumulative impact considerations would feature in applications for new development of onshore solar generation. In this context policy should be directed towards advancing demand reduction initiatives. These are already viewed positively from a planning perspective but the code should be improved to establish the highest energy efficiency standards as the norm.

Financial barriers are also widespread. While the costs of more mature generation technologies and components are falling and considered likely to fall further to 2025, techno-financial barriers are especially high for demand reduction initiatives. Supply chains are insufficiently mature to deliver components at low enough prices to enable cost-effective retrofit roll-out at the levels required to deliver the proposed savings. Significant co-ordinated responses are required to create viable business models and stimulate the market for retrofit products to make inroads in energy demand reduction. Financial barriers are also acute for technologies still at the demonstration stage in the UK, particularly those where regional resources are plentiful: tidal range and geothermal. The financial issues here are complex and closely linked to high levels of technology and deployment risk, the continued fall in the price of alternatives (wind and solar) and long-term energy policy at national level. Significant public and private investment in these technologies will be needed to reach commercial viability.

While the Maximum Technology scenario assesses Greater Exeter's potential position without technology constraints, the reality is that considerable technical barriers remain, most notably the South West regional grid infrastructure. This constraint impacts the majority of generation options reviewed in this study as well as the electrification of heat using heat pumps across all sectors. National government could choose to see this issue either as a costly barrier or as an industrial innovation challenge that would enable the UK to take a leadership role. Smart grid concepts have been around for a long time, but city-scale solutions have yet to be demonstrated. Greater Exeter, with leadership, investment and national assistance, could embrace new technologies and models to unlock the grid. A further technical barrier is posed by radar interference from onshore wind generation. This should not be an impediment to change: a co-ordinated approach linking strategic land use and consultation with air traffic users can achieve a framework in which safety is maintained while generation is accelerated.

Based on a quantified assessment of the barriers that currently stand in the way of delivering the Maximum Technology scenario, this study proposes a series of recommendations. These define a set of actions that should be progressed across the range of options available to Greater Exeter to maximise the likelihood of achieving energy independence by 2025.

RECOMMENDATIONS

1.1 | **RECOMMENDATION 1:**

FACILITATE THE DEVELOPMENT OF NET ENERGY POSITIVE BUILDINGS

The development of a supply chain and policy environment that ensures the delivery of net positive energy buildings is an urgent priority. New developments that positively contribute to city energy use will mean that less onshore generation development and retrofitting of older building stock will be required. Greater Exeter already benefits from progressive local authorities which actively pursue building energy efficiency objectives, in particular in their own properties. The next steps are to further encourage innovative solutions, combine insights and analysis to support tighter planning policy and develop mechanisms to significantly expand the project base.

1.2 | **RECOMMENDATION 2:**

DEVELOP CREDIBLE ROADMAPS TO LARGE-SCALE DOMESTIC RETROFIT

A key assumption in the Maximum Technology scenario is that viable business models which deliver large-scale retrofit will be developed over the time horizon. The development of credible roadmaps that deliver comprehensive intervention in this area is essential. This is a challenging undertaking which requires significant investment in skills, new solutions and the development of businesses that can integrate, finance and deploy the roll-out of multiple technologies at scale.

1.3 | **RECOMMENDATION 3:**

ENCOURAGE AND DEMONSTRATE INNOVATIVE SOLUTIONS TO REDUCE DOMESTIC APPLIANCE ENERGY USE

While space and water heating consume the largest proportion of domestic energy, appliance use represents 0.5 TWh of Greater Exeter demand. The benefits of upgrading to the highest efficiency appliances should be promoted and systems developed which enable and manage behavioural change to both optimise use and reduce overall cost. Identified technologies should be trialled and best practice fostered.

1.4 | **RECOMMENDATION 4:**

DEVELOP COMMERCIAL AND INDUSTRIAL CASE STUDIES

This study identifies 359 GWh of potential savings from commercial buildings and 250 GWh of potential savings from industrial processes, based on current understanding of technical opportunities. More specific demonstrator projects are required to advance and promote greater understanding of what is achievable across a varied range of end users. A diverse group of local commercial and industrial partners should be brought together to develop leading-edge strategies to encourage potential energy savings.

1.5 | **RECOMMENDATION 5:**

DEVELOP CREDIBLE ROADMAPS TO CUT TRANSPORT CONSUMPTION

Transportation is expected to represent 4.4 TWh of annual energy consumption by 2025. Developing roadmaps to significantly address this consumption is an essential priority, and is the focus of a forthcoming report. In this context, wider participation in the development of various options should be encouraged, in particular through Exeter City Futures' innovation programme.

1.6 | **RECOMMENDATION 6:**

CO-ORDINATE SOLUTIONS TO ADDRESS GRID CONSTRAINTS

The grid is a critical technical constraint that impedes the viability of projects across the region. Moving past this barrier is essential if the regional energy industry is to thrive. Several options exist including capacity amnesties, the socialisation of upgrade costs and technology-led options such as smart grid infrastructure. All would need considerable co-ordination with the local grid operator to progress, but should be seen as a pivotal issue for the South West economy and Exeter City Futures' goals. If this barrier can be overcome, Greater Exeter could play a key role in stimulating a regional approach to energy independence, drawing on the skills, expertise and innovation of local research and industry. Close collaboration with the Department for Business, Energy and Industrial Strategy (BEIS) and other national stakeholders is required to develop policy and technology mechanisms to realise the potential local benefits of regional generation.

1.7 | RECOMMENDATION 7:
STIMULATE ONSHORE GENERATION

In the face of considerable planning barriers, improved stakeholder understanding of the impact of onshore generation options - principally wind and solar - is required. Co-ordinated Greater Exeter multi-authority strategic planning is needed to optimally locate new generation and work openly and collaboratively with the public to identify solutions that would be acceptable in the context of the energy choices available. Furthermore, the exploration of generation technologies that achieve higher levels of aesthetic acceptability should be encouraged. This is already happening within the solar industry, with the introduction of technology integrated into rooftops and roads. Further integration into other standard infrastructure could achieve both new generation and cost reduction without facing political barriers.

1.8 | RECOMMENDATION 8:
PROVIDE AN ECONOMIC EVIDENCE BASE

Evidence for the economic benefits of the proposed approach to energy independence and the opportunities afforded by being at the forefront of integrated smart energy infrastructure development should be provided, and is the focus of a forthcoming report. Demonstrating significant potential for increased local productivity, jobs and growth will enable the development of a wider network of support for this approach.

1.9 | RECOMMENDATION 9:
ENCOURAGE AND SUPPORT RESEARCH INTO ENHANCED GENERATION EFFICIENCY

Estimates of generation made here are potentially conservative. While they are based on widely accepted methodologies, the efficiency of many technologies can be expected to improve with time. Extrapolating the historical trends in technology efficiency would increase the estimates of generation made in this report. Research into areas with the potential to improve natural energy resource conversion efficiency, for example, solar cell technology, should be prioritised.

1.10 | RECOMMENDATION 10:
ENCOURAGE INVESTMENT IN MARINE AND GEOTHERMAL TECHNOLOGIES

In the wider South West region, geothermal and marine technologies offer sizeable generation potential in the Maximum Technology scenario. These capital-intensive sectors require significant levels of investment to reach commercial viability. High technology and deployment risk, alongside falling substitute technology prices, mean public sector support is likely to be required to achieve long-term market development. Private investment and innovation in these sectors should be supported and promoted, alongside strategic engagement with policy-makers at national level.

Final

REPORT TO: **Place Scrutiny Committee**
Date of Meeting: **09 March 2017**

REPORT TO: **Executive**
Date of Meeting: **14 March 2017**

REPORT TO: **Full Council**
Date of Meeting: **25 April 2017**

Report of: **Tourism & Sport Manager**
Title: **Development of a New Brand – Visit Exeter**

Is this a Key Decision?
No

Is this an Executive or Council Function?
Executive and Council in relation to budget

1 What is the report about?

1.1 To report on work undertaken to establish a new brand for Exeter - Visit Exeter - to increase the number of people who visit the city for a day visit, overnight leisure break, a business trip and a group visit.

1.2 To update on the development of marketing activity under the newly developed brand – Visit Exeter.

2 Recommendations:

2.1 That Place Scrutiny support the adoption of the Visit Exeter brand.

2.2 That Place Scrutiny support marketing activity, as listed in this report.

2.3 Executive to recommend to Council that all projected additional income via Visit Exeter membership sales (estimated £82,500) is ring-fenced for tourism marketing spend.

3 Reasons for the recommendation:

3.1 To enable the City Council to proactively promote the city to increase the number of visitors to city, and to increase visitor spend.

3.2 To raise the profile of the city within the UK and overseas, as a vibrant, culturally modern visitor destination.

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

4.1 The existing tourism marketing budget of £65,650 will be used to deliver activity within this report. Existing members of staff, 2 FTE's are in addition to this budget.

4.2 Additional income will be generated through the development of annual membership and sponsorship packages for businesses to buy into. It is estimated that an additional £82,500 will be generated to support marketing activity within this report. 100% of income achieved will be used for marketing activity and will not channelled towards covering overheads. Only income that is generated will be reinvested back into tourism marketing of the city e.g. If we generate only £50k of membership income, we will only spend that £50k. As this is an annual membership we will know in April what we have to spend for the following year.

5. Section 151 Officer comments:

5.1 The additional income and proposed ring-fencing is noted. If approved the budgets will be adjusted to reflect the proposal.

6. What are the legal aspects?

6.1 Section 144 of the Local Government Act 1972 gives Local Authorities power to encourage persons, by advertisement or otherwise, to visit their area for recreation, for health purposes or to hold conferences, trade fairs and exhibitions in their area.

7. Monitoring Officer's comments:

7.1 This report raises no issues for the Monitoring Officer.

8. Background

8.1 Until August 2016, Exeter was marketed under the Heart of Devon Tourism Partnership, an external limited company, with Exeter City Council providing support in the form of an annual grant (£35,000) and staff. The company was set up as an independent partnership of private sector organisations/associations and Exeter City Council, to promote Exeter and the wider sub-region of East Devon, Mid Devon and parts of Teignbridge. However, no financial support was provided from neighbouring Local Authorities, all work was undertaken by staff from Exeter City Council. It was at this time, Exeter City Council withdrew its support to the Heart of Devon Tourism Partnership.

8.2 September 2016, the Heart of Devon Tourism Partnership formally merged with Visit South Devon, and Exeter City Council took on the responsibility of promoting the city. The Visit Exeter website www.visitexeter.com was extracted from www.heartofdevon.com where it was previously a sub-website and Exeter City Council took the responsibility of this website and associated social media accounts.

8.3 With recent developments in Exeter including the opening of Queen St Dining, the regeneration of the Bus Station site and Exeter hosting major events including Rugby World Cup 2015 and Radio 1's Big Weekend; the City Council is well placed to increase the number of visitors to the city.

8.4 The aim of Visit Exeter is to increase the profile of Exeter with the UK and overseas and to increase the number of people visiting the city, by positioning the city as a high quality cultural visitor destination, to rival similar UK competitors.

9 Research to develop a new brand

9.1 September 2016, the City Council commissioned Power Marketing to undertake national research to aid us to develop the Visit Exeter brand, the results of the research can be viewed in **Appendix 1**. In Summary:

- Exeter is mainly viewed as an historic city, which is easy to get around and a good base for exploring the South West. This fits comfortably with their key requirements that respondents look for when considering a short break in the UK

- Exeter scores low on perception as a stylish and vibrant city. However, it would appear that a lack of knowledge (which can be addressed through marketing communications) rather than a perception accounts for low scores

- There is a perception that Exeter is “too far away” for a day trip or a weekend break. This linked to the perceived (and experienced) barriers of congestion and expensive parking add to the view by some that it is “difficult to get to”

- The range of cuisines and restaurants appear to have high awareness (along with the Cathedral, historic buildings and the University) possibly indicative of the new developments at the Guildhall and at Princesshay

- Cultural assets appear to be less well known

9.2 The results of the above research and research undertaken by Visit Devon and Visit England has been used to develop marketing activity to promote Exeter within the South West region, throughout the rest of the UK and overseas to increase both day and overnight visitors to the area with a focus on increasing visitor spend, business and group visits.

9.3 The results of the Visit Exeter research have been shared with Exeter BID, the Exeter Cultural Partnership and the Exeter business community so that they can use the results to help inform their marketing activity and to improve their product offering to attract more visitors, especially overnight stays.

9.4 BelieveIn, who are based in Exeter, were appointed to develop the Visit Exeter brand using the results of the research developed through Power Marketing and research through Visit Devon and Visit England, which can be viewed in **Appendix 2.**
Two focus groups were held autumn 2016 with businesses located in Exeter to gather independent views on how the city should be promoted and their perceptions of the city.

9.5 BelieveIn also developed the Exeter BID brand, due to this, it was sensible to use the same company to develop the Visit Exeter brand due to the extent of work already undertaken to develop the Exeter BID brand.

10 Launching the Brand

10.1 **Local launch**
The launch of the Visit Exeter brand will take place at RAMM, an inspirational space and a showcase for the city, during English Tourism Week: 25 March – 2 April 2017. The event will bring together a range of businesses from across the city and

surrounding areas, to raise the awareness of the new brand. The event invite list will be limited (due to space) and will include:

- Key business professionals from across the Exeter area
- Local and regional press
- Tourism industry leaders
- Bloggers
- Governing bodies to include Visit England

10.2 A few weeks prior to the local launch at the RAMM, the Tourism team in conjunction with the Communications department will create engaging content surrounding the launch to build a buzz and a conversation. This will involve sending out press releases and sharing content across www.visitexeter.com and social media. The use of local business network and channels to help spread the message will be critical for the success of the launch and to raise the profile of Visit Exeter. Channels include:

- Database of businesses across the Exeter area
- Exeter Chamber of Commerce & Trade
- Exeter BID
- Visit Devon

10.3 **National Launch**
Following on from the launch in Exeter, we are in the process of planning a national launch, which will include a targeted national marketing campaign which will include an event in London. This event will engage with a wide audience and seek to establish Exeter as a city weekend break and business tourism destination, within 3 hours of London.

10.4 The local and national launch events are all about raising the awareness of the brand and Exeter as a culturally vibrant, modern city break destination, and bringing together the tourism business community and stakeholders – something that has not taken place in Exeter for many years.

11 Membership and Marketing

11.1 A membership package has been developed for Exeter businesses buy into to join Visit Exeter, they would benefit from a range of online and offline marketing opportunities, business support activities and training opportunities. Going forward the focus of the tourism team will be focused on promoting Exeter and supporting city businesses.

11.2 Commencing February 2017, Exeter businesses will be invited to join Visit Exeter with a choice Bronze, Silver and Gold membership packages available. The more a business pays the benefits they receive in return, as shown in **Appendix 3.** The pricing for packages has been set, following extensive industry research, making Visit Exeter membership an affordable option for businesses of all sizes. The selling of membership will administered by the Tourism Promotion Officer prior to the local launch, and as an incentive will be offered 14 months membership for the price of 12, with memberships due for renewal in April 2018.

11.3 **Visit Exeter Marketing Activity**
With a new brand and with an exciting new identity, Exeter has a lot to shout about. The new brand provides a unique opportunity to really put Exeter on the map and showcase a destination that offers so much diversity. The plan will be to launch both a local and national campaign, however the aim of running a more localised

campaign first means that we are able to get the people of Exeter engaged and contributing to the promotion of Exeter.

11.4 **Enabling the local community**
Exeter has a community spirit and there is a unique opportunity to get the people of the city to support Visit Exeter. Part of the launch will be to encourage residents and businesses to participate and spread the word about our great city.

A Competition - Why We Love Exeter
As part of the local enabling campaign we want to get people talking about all of the crazy and quirky reasons they love Exeter. I #LoveExeter because….. The competition will run across social media channels and will ask local people to complete the above sentence, with the winner being selected prior to the local launch with an invitation to the launch held at RAMM.

User Generated Content
The new website will include a section designed for user generated content so that the people of Exeter can suggest things to do and places to see linked to the above experiences. Visitors will then be able to see some of the great things on offer and places to visit, but will be able to see local guides written by local people where they can uncover some real hidden gems.

11.5 **National marketing of Exeter**
With research still highlighting that public perceptions lean towards Exeter as a city for history and heritage there is a need for showcasing the diversity of Exeter as a city break destination and to highlight some of the many dimensions people are missing out on. Taking into account the results of the research to develop the Visit Exeter brand we have looked across the spectrum at all that Exeter has to offer and also at what people look for in a destination and come up with a clear but simple campaign focus. This will form the basis of a regional and national marketing campaign, as shown below:

8 Experiences - 1 Destination
To allow for more specific demographic targeting and also to attract the broadest possible interest we are focusing on eight key channels.

1. Culture - Focused on theatre, events, music and art

2. Heritage - Focused on traditional Exeter and historic places & visitor attractions

3. Nightlife - Showcasing Exeter by night, the clubs the bars, the restaurants and live music scene

4. Food and Drink - The local producers of food and drink are globally renowned; let's make this a focus and a reason to visit Exeter

5. Activity - The amazing outdoor spaces, the sport and the fantastic range of activities you can enjoy in and surrounding Exeter

6. Business - Business tourism is a major sector for Exeter, let's celebrate this and encourage additional business events to be held in the city

7. Shopping - Shopping provides a huge draw to the city with the ever growing list of big high street names and independent retailers

8. Relaxation - As well as a place with so much going on, Exeter also provides the perfect place to kick back and relax whether it's at the spa or in the amazing outdoor spaces

12 Website/Digital Tender

12.1 The coming year represents a pivotal year for online tourism promotion of Exeter. The current Visit Exeter website uses the Heart of Devon template which was created in 2011, and therefore is beginning to show its age in terms of design and functionality.

12.2 However, Exeter's decision to separate from the Heart of Devon Tourism Partnership provides a real opportunity for a new tourism website for the city to showcase its own brand identity. The brand will reflect the strengths of the city's product – a rich heritage and culture, high quality local food and drink, a vibrant calendar of events, and a strong connection to the surrounding Devon countryside and coast.

12.3 As such, the decision has been taken to redevelop www.visitexeter.com to a visually-stronger, more intuitive design that performs better in search engines and is mobile-responsive.

12.4 There is also the requirement to ensure the website moves forward with a sustainable commercial model for the city. With this in mind, the site needs to continue to grow as an effective income stream, and a rebuild provides the ideal opportunity to develop a more commercial model – linking to membership in section 11 of this report.

12.5 In securing individual elements of the planned activities, the Council's financial procedures for procurement through competitive quotes have been followed. The Website & Digital tender was secured through a competitive process, with the new website due to be launched March 2017.

13 Monitoring

13.1 All marketing activity undertaken will be monitored and will deliver value for money and a tangible objective, a set of KPI's will be develop to monitor the effectiveness of marketing activity. In the case of awareness marketing we will ensure it is complementary to a specific campaign so trends can be analysed and measured.

14 Exeter Visitor Strategy

14.1 The previous Tourism/Visitor Strategy for Exeter covered the period 2012 – 2016 and highlighted five key priority areas for development. These priorities will now be reviewed and time spent developing a new strategy for the city. A draft strategy will be brought to Place Scrutiny later this year.

14.2 Initial concepts being worked on align with the City Council's vision to be an Active City in exploring healthy/active tourism to complement current priorities.

14.3 Within the new Visitor Strategy we will look to develop overseas marketing campaigns to promote the City to the international market, starting with European destinations. This work will be will in partnership with Visit Devon, Visit England and Exeter BID.

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

15.1 Visit Exeter has been set-up to support the council's priorities and purposes:

Priorities:

To grow Exeter's cultural and visitor economy which maximises economic benefit for the benefit of businesses and the residents of Exeter.

Implement/develop on and offline marketing strategies to promote the city to domestic and international markets, leisure and business to make Exeter a leading destination within the UK.

Purposes:

Help me grow a successful business

Provide me with great things to see and do

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

16.1 Risks to the City Council are limited as Visit Exeter will remain within the City Council's management. No external appointed board will be set up; a steering group will be established. Therefore all financial implications remain in the council's control.

17 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?

17.1 The objectives of Visit Exeter are designed to promote equality and diversity and our new Visitor Strategy will promote activities which encourage healthier life styles and well-being.

18 Other Options

18.1 There are no other options being considered in planning and implementing the delivery of Visit Exeter.

Catherine Hill
Tourism & Sport Manager

<u>Local Government (Access to Information) Act 1972 (as amended)</u>
Background papers used in compiling this report:-
None

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

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power marketing

a different perspective

Market Research Report

For Exeter City Council – November 2016

To: Victoria Hatfield – Economy and Enterprise Manager

From: Sarah Ingram – Lead Consultant

Date: 14.11.16

Research Aims and Objectives

- The key focus of the research is to inform on the development of the Visit Exeter brand:

  - To understand what those taking day trips* or short breaks in the UK (South West) look for when considering a destination
  - Establish what key features respondents associate with Exeter
  - To identify the key words respondents would use to describe Exeter
  - To test a number of descriptive statements about Exeter and the level of agreement with them
  - To understand any differences between those that have visited Exeter and those that have not
  - To test the propensity of respondents to consider Exeter when thinking about taking a break in the UK.

*including those taken as part of an annual holiday. It is recognised that it is unlikely that the majority of visitors to Exeter come to Exeter as their main annual "summer" holiday. It is far more likely to be considered as a day trip, weekend break destination.

Research Methodology

- An online survey was developed and the link sent to 2 key audiences:
  - Online panel managed by a leading panel provider targeting:
  - 18+ adults living in: South West, London and South East, West Midlands (those areas that traditionally a large number of visitors to the South West live in)
  - Additionally we used a screening question at the start to rule out those who would state they have never been to or heard of Exeter
  - Using this methodology we obtained 1,128 complete responses

  - Additionally, Exeter City Council sent the survey to the Visit Devon database of around 2,000-3,000 people.
  - Using this methodology we obtained a further 153 complete responses.

  - Overall 1,281 complete responses were obtained giving statistical reliability at the 95% confidence level +/- 3%.
  - The fire at the Royal Clarence occurred during the fieldwork period so there was a heightened level of publicity about the City – nationally as well as locally.

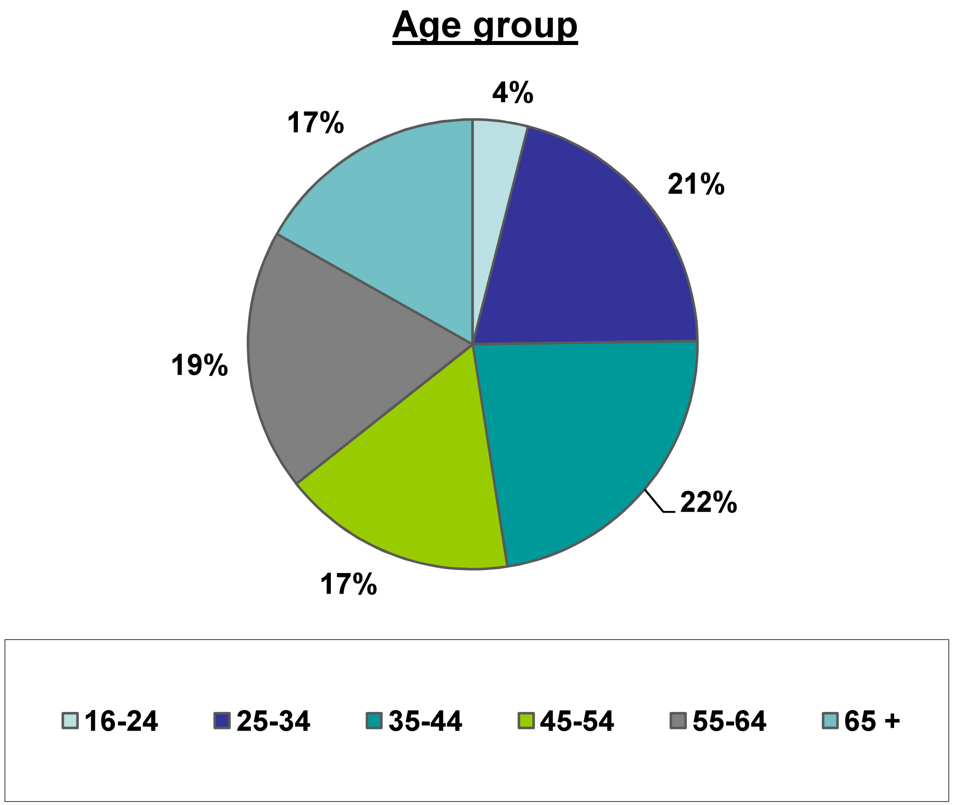
About the report

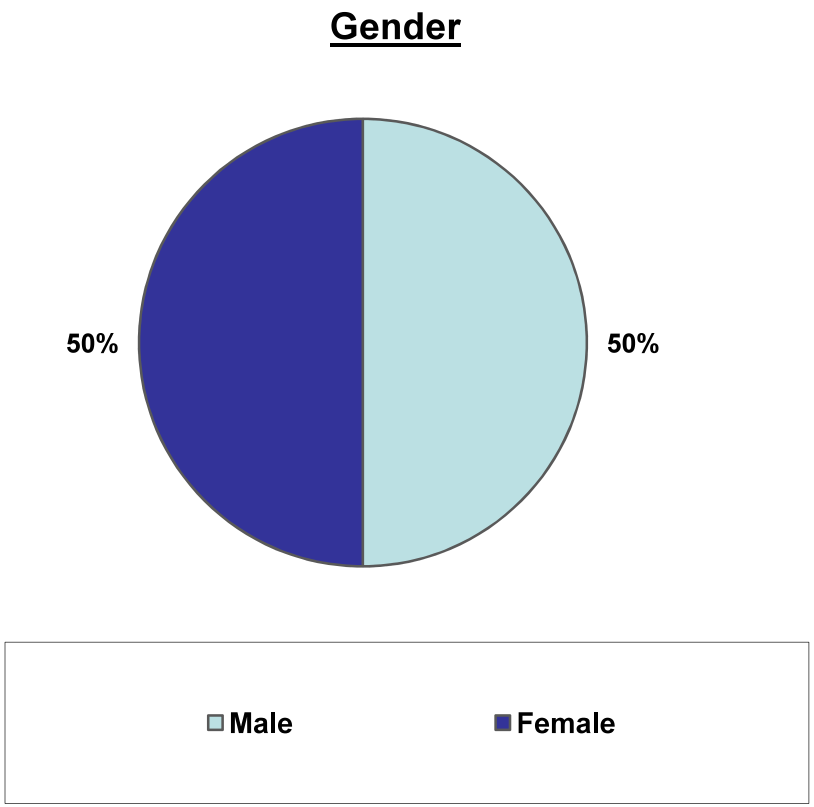
- This report has been designed to highlight key findings from the surveys. Reporting has been carried out at an holistic level combining the results from both surveys.
- Where the responses from the Visit Devon database differ from the panel respondents, these have been highlighted.
- Where open-ended questions have been asked, verbatims have been selected to give an overview of the type and range of comments received.
- Percentages may not always add up to exactly 100% due to rounding.
- The sample size for each question varies as not all respondents answered all the questions.

Who responded?

Classification – Age and Gender

The survey achieved a good spread of ages and genders. The Visit Devon respondents were more likely to be older (45+) and female.

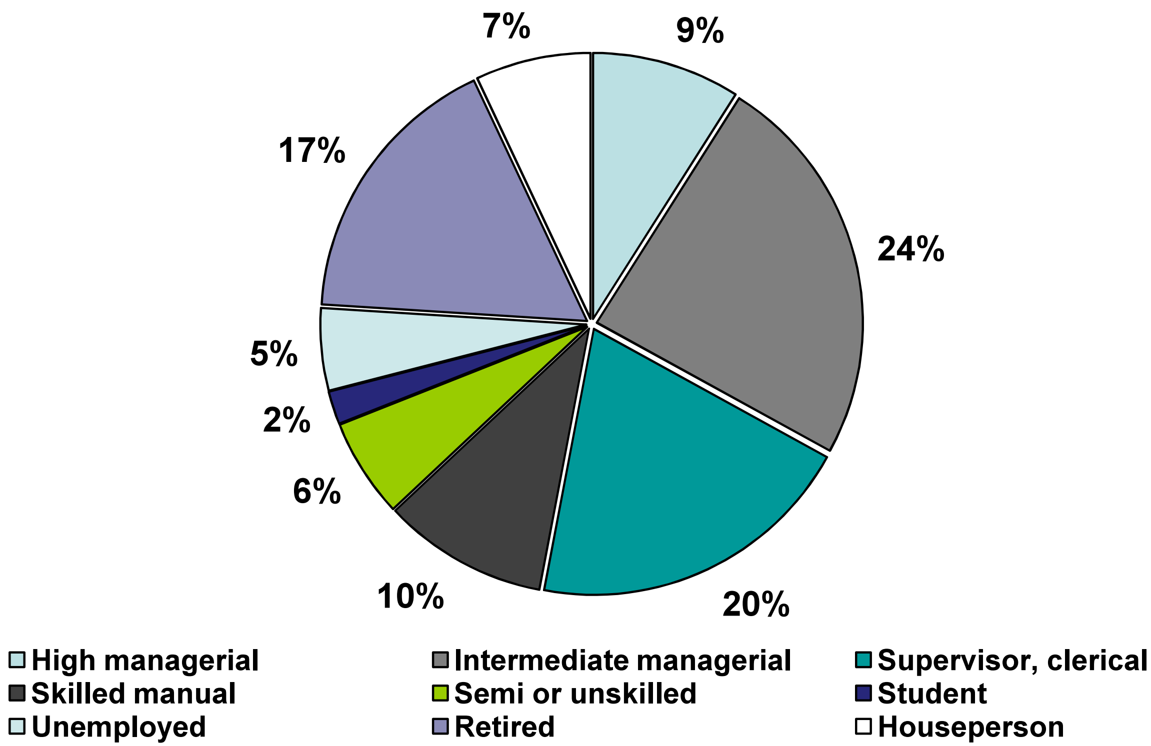




Sample Size = 1,281

Employment type

The survey achieved a good spread of employment types with the majority being in the intermediate managerial and supervisor roles. Those on the Visit Devon database were more likely to be retired (linked to the older age profile).

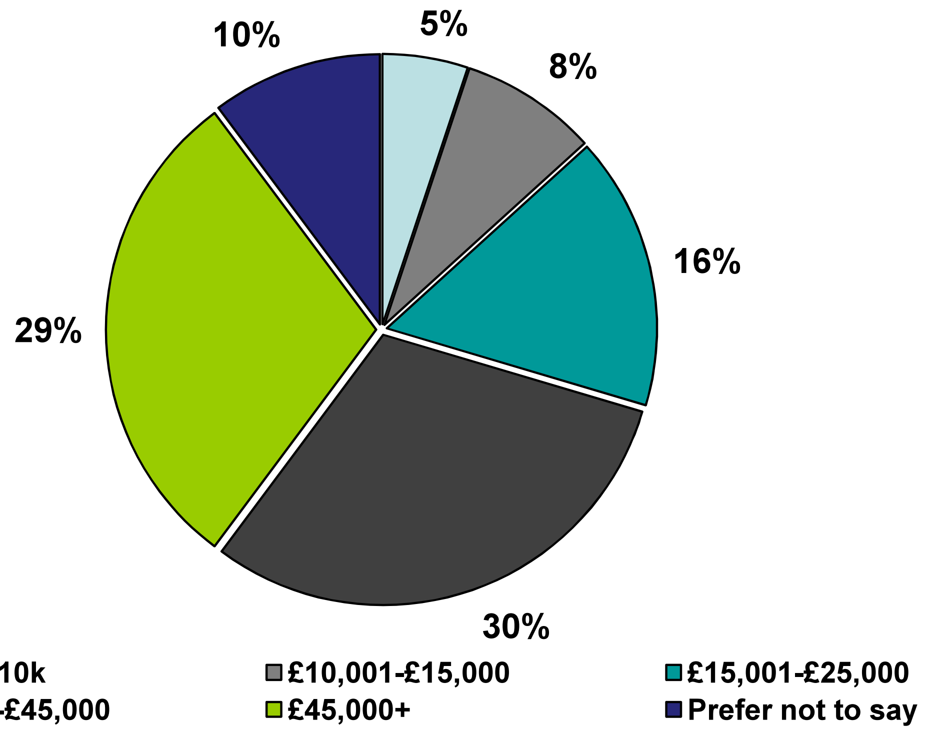


Sample Size = 1,281

research comms strategy

What is your current annual household income?

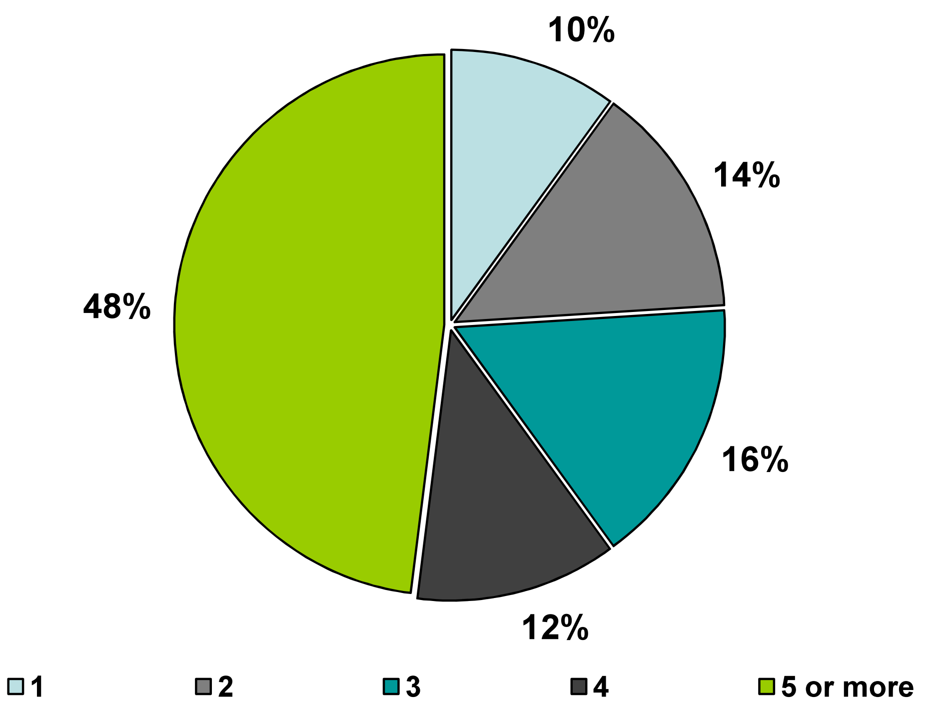
The survey achieved a good spread of household incomes with over half of households having an annual income of £25,000+ in line with the national average. The Visit Devon respondents were more likely to tick “prefer not to say” probably due to lack of anonymity.



Day/overnight trips in the UK

Typically how many trips (day and overnight) do you take in the UK each year?

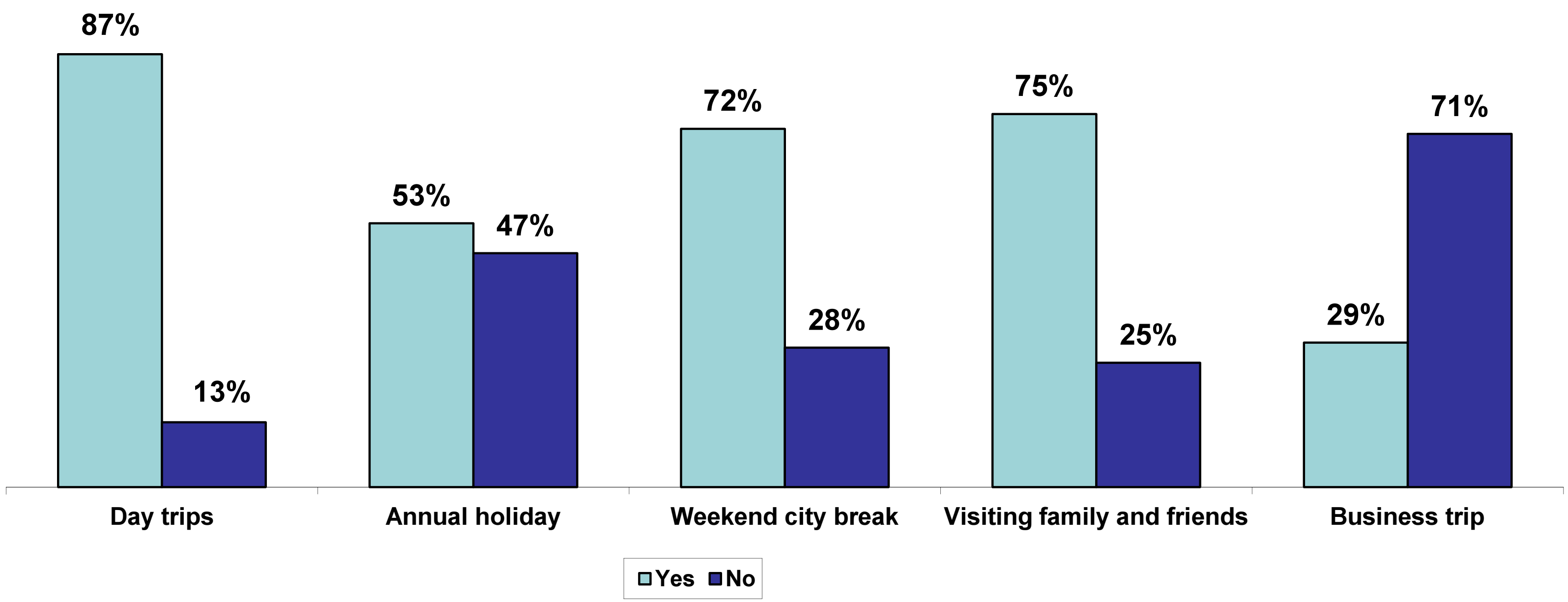
Nearly half of the respondents take 5 or more trips in the UK each year.



Sample Size = 1,281

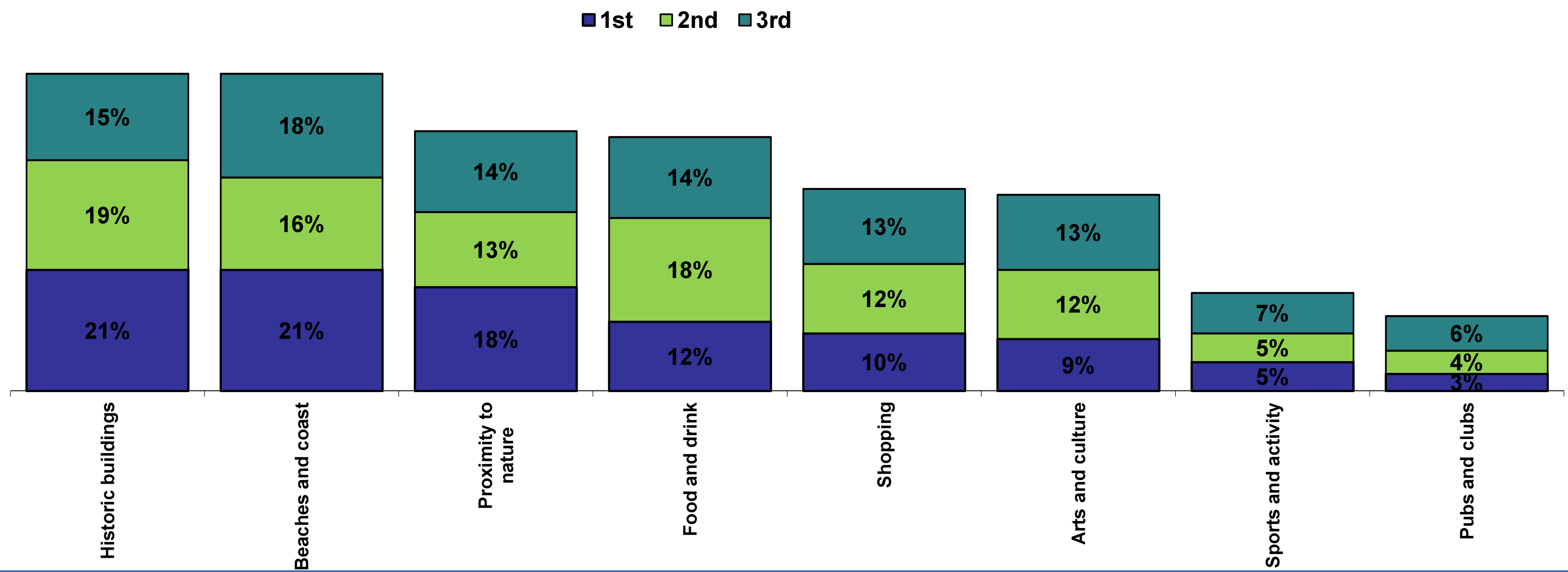
What is the main purpose of those trips?

As suspected the majority of respondents take day trips and weekend city breaks in the UK rather than their annual holiday (although those on the Visit Devon database significantly more likely to take an annual holiday in the UK). Visiting family and friends also accounts for a large number of trips.



Which are the most important features when looking for a place to visit for a day trip or short break in the UK?

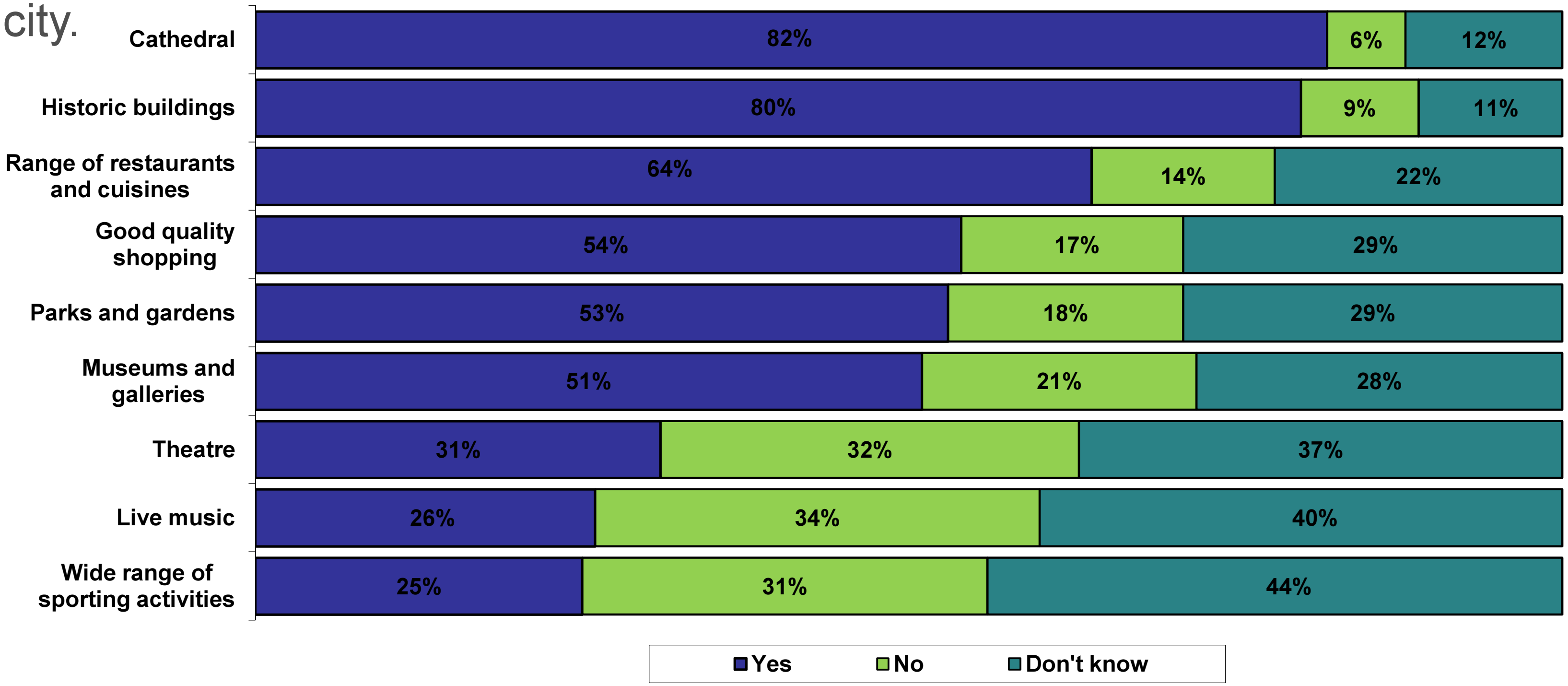
The top 3 features taking all mentions into account are for historic buildings, beaches and coast and proximity to nature. Pubs and clubs would appear to feature lowest when respondents are considering a day trip or short break.



Views on Exeter

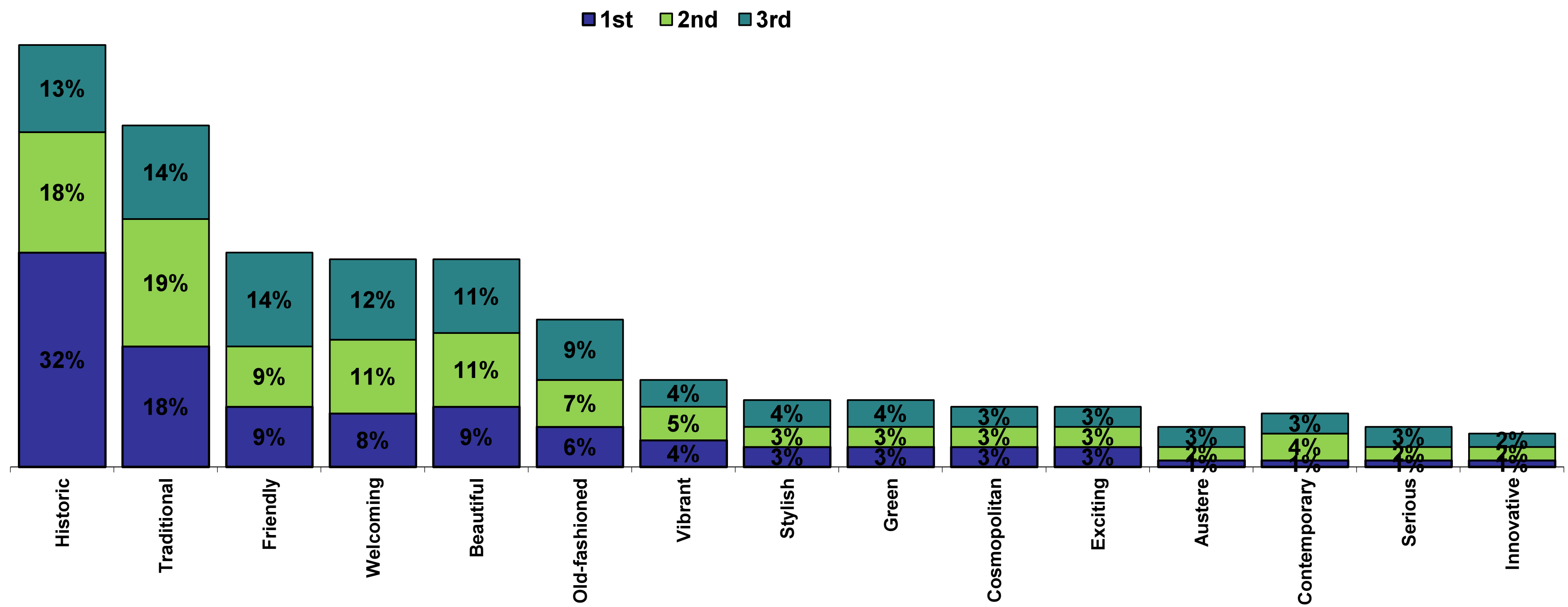
Which of the following do you associate with Exeter?

Perhaps not surprisingly, the Cathedral and historic buildings are those features most commonly associated with Exeter. The University and the coast were also mentioned. Encouragingly, given the recent developments at the Guildhall and Princesshay, restaurants and shopping also feature highly. The arts and sporting activities are the least likely to be associated with the city.



Please select the 3 words that you would use to describe Exeter

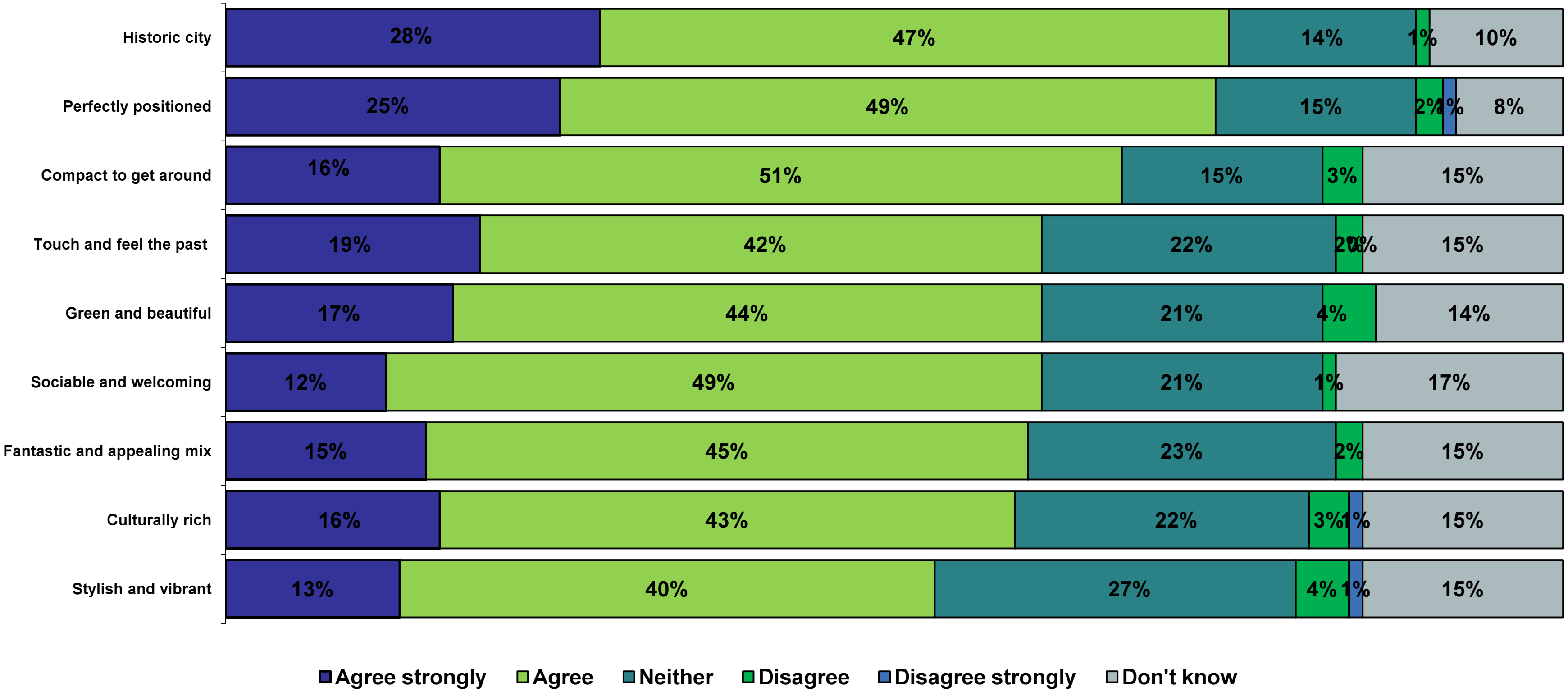
In common with the features they associate with Exeter (Cathedral/historic buildings), the top 3 words respondents would use to describe Exeter are: historic, traditional but also friendly (followed closely by welcoming). Very few would describe it as stylish, exciting, contemporary or innovative. Those on the Visit Devon database were more likely to describe it as vibrant (care very small sample size).



Sample Size =1,128

To what extent do you agree or disagree with the following….?

Again, statements about Exeter being an historic city filled with fascinating heritage gain the highest levels of agreement followed by its position to explore the South West and compact size. However none of these statements have very high levels of disagreement with a significant minority claiming that they “don’t know” enough to form a view.



power marketing

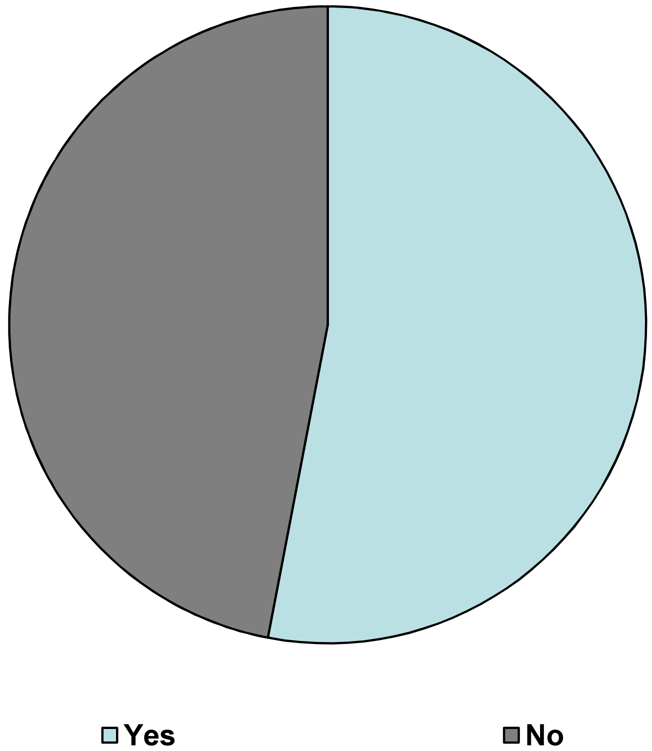
Sample Size =1,281

research comms strategy

Visitors' views on Exeter

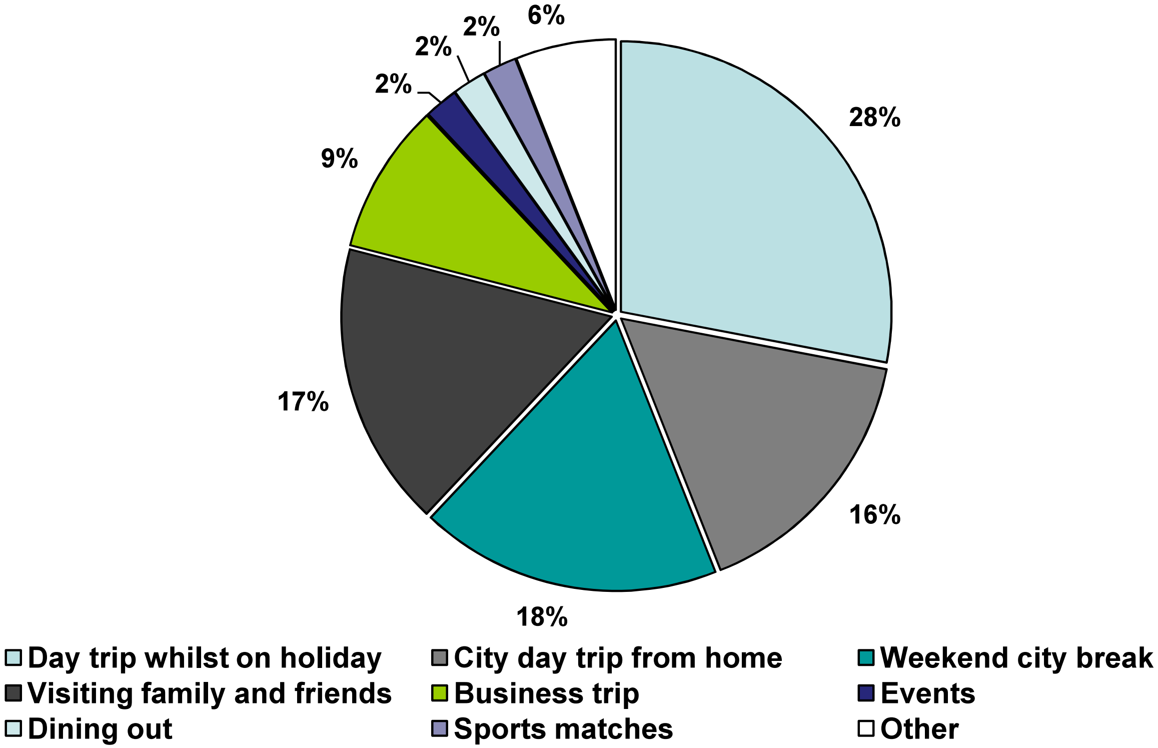
Have you visited Exeter at all for any purpose in the last 5 years?

Over half of the panel respondents had visited Exeter in the last 5 years. Nearly 7 in 10 of the respondents from the Visit Devon database had visited.



And what was the purpose of this visit?

Whilst over a quarter had visited whilst on holiday, over a 1/3rd had also visited as a day trip from home or for a weekend city break. “Other” included visiting the University, stopping over on the way to Cornwall and that they live/work here (Visit Devon database).



Sample Size = 1,281

What do you like most about the City?

Echoing the earlier findings, those who had visited Exeter listed the following:

- Cathedral
- Historic
- Shopping
- Atmosphere
- Beautiful
- Clean
- Green
- Friendliness
- Compact
- Culture

Sample Size = 666

What do you like least about the City?

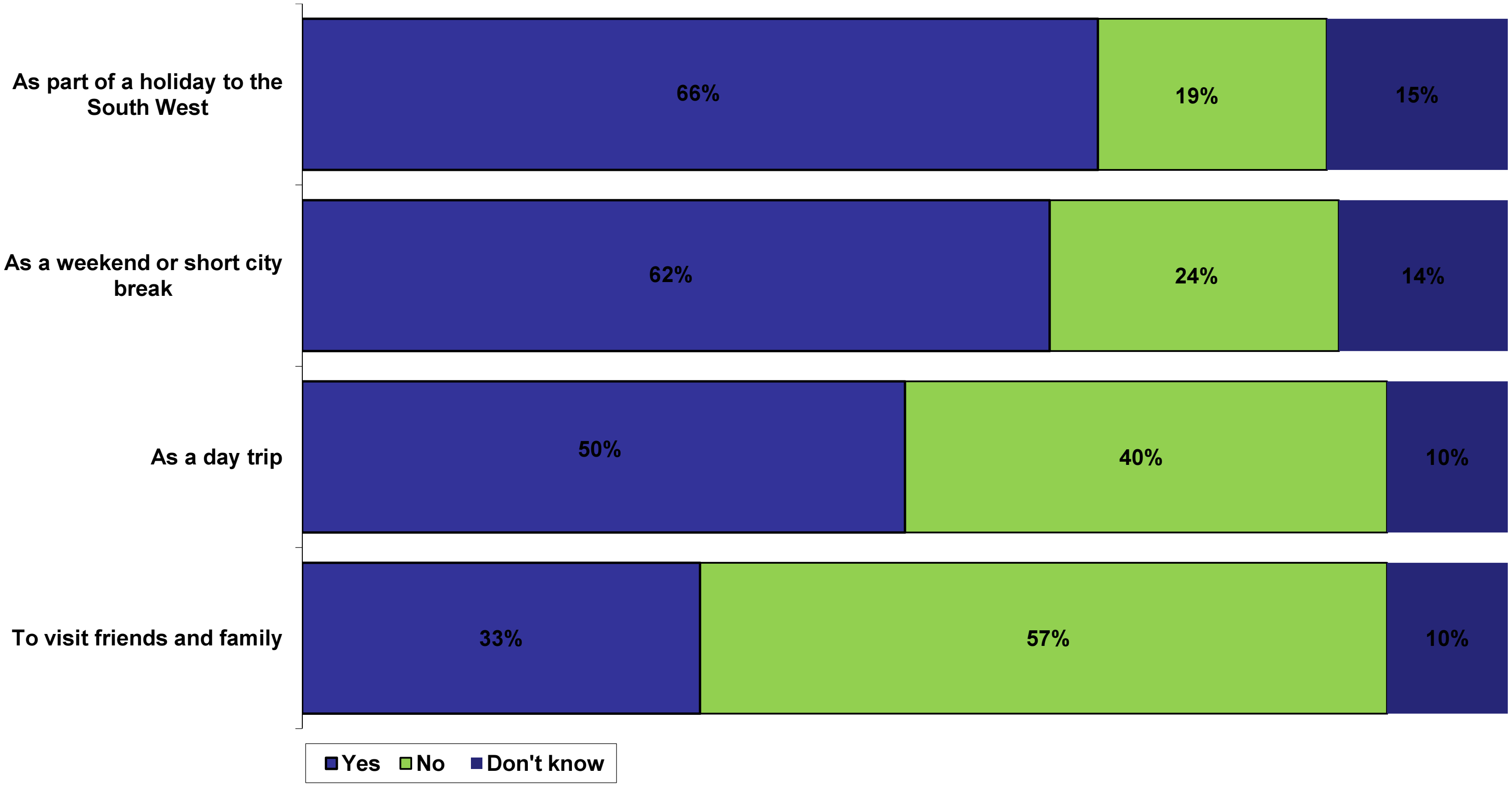
One of the major issues for those who responded was the distance to Exeter. Other issues appeared to be mainly with traffic and parking.

- Far
- Roads
- Parking
- Traffic
- Long way

A few comments from the Visit Devon database mentioned “too many chain restaurants and shops” and “homelessness and beggars” again these tended to be from the small minority who live/work in Exeter.

How likely would you be to consider Exeter?

Whilst the majority would visit Exeter as part of a holiday to the South West, a significant number would also consider if for a short break or for a day trip. Those saying “No” tended to cite the distance as a reason not to visit particularly for the day or a short break.



Sample Size = 1,281

power marketing

research comms strategy

Summary

- Exeter appears to be mainly viewed as an historic city which is compact to get around and a good base for exploring the South West. This fits comfortably with their key requirements for historic buildings, beaches and coast and proximity to nature that the respondents look for when considering a short break in the UK.
- However, it would appear that a lack of knowledge (which can be addressed through communications) rather than a perception accounts for the lower scores for such descriptions as stylish and vibrant.
- The small minority who do agree with such statements about Exeter, tend to be those who have visited it and/or work in the City.
- There is a perception that Exeter is "too far away" for some for a day trip or a weekend break. This linked to the perceived (and experienced) barriers of traffic and parking add to the view by some that it is "difficult to get to".
- The range of cuisines and restaurants appear to have high awareness (along with the Cathedral, historic buildings and the University) possibly indicative of the new developments at the Guildhall and at Princesshay. Cultural aspects (eg. Theatre) conversely appear to be less well known.

power
marketing
a different perspective

exeter

brand identity guidelines

A stronger city identity, for the benefit of the many people who:

Live in Exeter

Visit Exeter

Work in Exeter

Stay in Exeter

Study in Exeter

Play in Exeter

Our City

Exeter was first occupied around 250BC. The latest figures estimate the city population at 125,000 people, with a further 330,000 people living within the travel-to-work area.

For over 2000 years, Exeter has thrived as a well-connected community set in beautiful surroundings. Today, Exeter is a welcoming and stylish city strengthened by its heritage and its closeness to nature.

Exeter is a city where people come together to make good things happen.

A city filled with stories — old, new and yet to be written.

A city that supports creativity and inspires new beginnings.

Identity

Master artwork is available from all of the Exeter partners that are using the new identity. Please ensure that you obtain the latest version and never try to create it yourself.

Our identity provides a distinctive yet flexible foundation to help us promote our city. Different partners will use it in ways that are specific to their needs, but the core identity remains constant and should not be altered.

The core identity consists of 3 main elements — the 'Exeter' wordmark, an 'EX' avatar for social media and the 'Start here' graphic device for signposting opportunities.

exeter

ex

start here

Wordmark

Various partners will use the new identity in different ways depending on their needs. The core wordmark remains constant and should not be altered.

Uses negative space to accentuate and amplify the letter x (which phonetically is the first syllable in the word Exeter). This provides visual interest while retaining simplicity and strength.

Thanks to its simplicity,
the wordmark will reproduce
easily in many different
colour combinations,
as long as sufficient
contrast is retained.

Avatar

'EX' provides a link back to our surrounding areas (the postcode prefix), and phonetically it links to the River Exe, the source of so much of Exeter's influence and importance over the years.

Reduces our wordmark down to its most essential components, the letters e and x. It is designed to work at small scale and especially in social media for avatars.

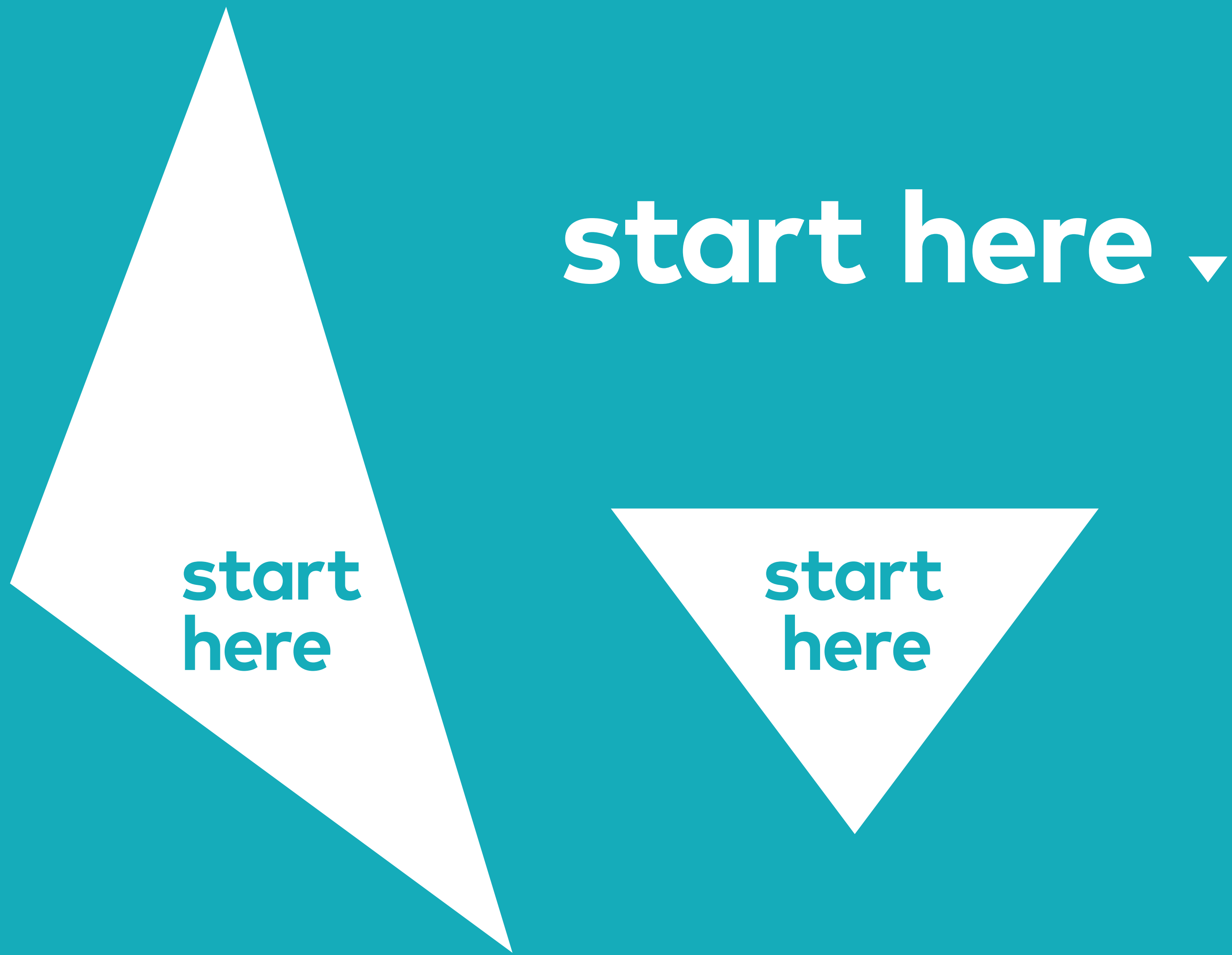
The avatar becomes a strong unifying device for all the partners who share the job of building our brand. Colour becomes the vehicle to differentiate between them.

Start Here.

'Start Here' reflects our desire to help people get more from their time in the city.

This is less of a strapline and more of a call to action, a chance to signpost or introduce various activities, events, places and opportunities.

We use the triangles (taken from the avatar) at different scales and orientations to act as pointing devices or bold supporting graphics.



Colour / Imagery

The identity is designed to offer plenty of flexibility in its use of colour, enabling various campaigns and partners to create distinctive materials that feel individual while connecting back to the core identity.

Different partners utilise colour & imagery in different ways, depending on their needs and the needs of their audience. Please refer to the specific guidelines created for the partner you are working with.

Visit Exeter

Primary palette

Supporting palette

In Exeter

Primary palette

As new partners star to use the identity, additional palettes will be created to meet their needs. These are examples of palettes currently in use, and not an exhaustive list.

In use. Examples

You are encouraged to use the Exeter brand in interesting and creative ways. If you have created something that you'd like to show off in future editions of these guidelines, please feel free to share it (contact details at the end).

The visuals on the following pages were created to demonstrate how the brand might work in application — as such they are not actual items, but hopefully will provide some useful inspiration.

Page 69


EXETER CATHEDRAL
COME IN AND ADD YOUR BRICKS TODAY
SUPPORT THE
BIG LEGO® BUILD
FOR EVERY £1 DONATED A BRICK CAN BE ADDED TO OUR 300,000 BRICK SCALE MODEL.
#BIGLEGOBUILD
start here
exeter-cathedral.org.uk
EXETER CATHEDRAL


Pinhoe K
36255
Stagecoach
WA11 CHO
your local bus
ex-citi
COME DRIVE
WITH US
WE'RE HIRING
IN EXETER
start
here
stagecoach.com
Stagecoach

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Page 73

visit exeter

brand identity guidelines

Visit Exeter is the official tourist board for the city.

Our mission is: To tell Exeter's story brilliantly. To inspire and inform visitors.

To help boost visitor numbers. To make Exeter a leading visitor destination.

Exeter core assets

There are a number of partners using the new Exeter wordmark. You'll need to refer to the master guidelines as well as these supplementary ones (that are specific to Visit Exeter).

Please refer to the master guidelines for more details on the core assets, including:

- Wordmark
- Avatar
- Start Here
- Usage

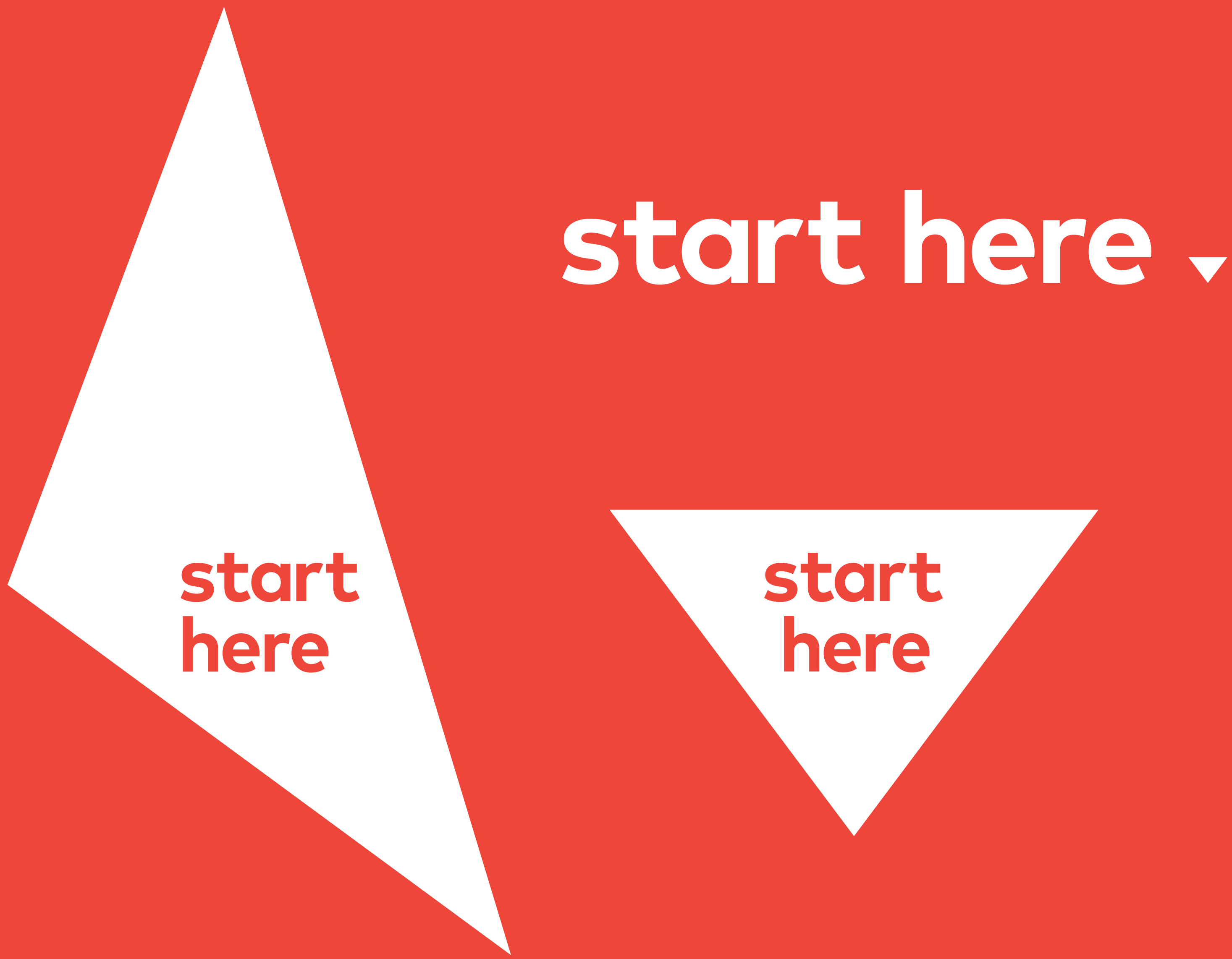
The core identity consists of 3 main elements — the ‘Exeter’ wordmark, an ‘EX’ avatar for social media and the ‘Start here’ graphic device for signposting opportunities.

exeter

ex

start here

We use the triangles (taken from the avatar) at different scales and orientations to act as pointing devices or bold supporting graphics.



Our Logotype

The identity has been carefully designed, you should never try to redraw or recreate it.

We have a specific Visit Exeter logotype, adapted from the core wordmark. This can be used in place of the Exeter core wordmark, but the two should never be used in the same field of vision.

The logotype encourages visitors to immerse themselves in all that the city has to offer.

Exclusion zone.
The exclusion zone defines an area around the logotype that should be kept free of all text or graphic elements.

Our Colours

If you're unsure which colour would work best for the identity, see if there's one that fits well with the colours in your imagery.

The colour palette consists of 8 primary colours and 8 supporting secondary colours, plus black and white.

Primary

This palette can be used on its own, it is the core palette for reproducing the logotype.

TANGERINE

Pantone® 715
C0 M55 Y88 K0
R246 G139 B55
HEX #F68B37

CHERRY

Pantone Warm Red
C0 M87 Y80 K0
R239 G72 B62
HEX #EF483E

RICH RED

Pantone 7626
C3 M93 Y95 K12
R207 G48 B38
HEX #CF3026

BURGUNDY

Pantone 1815
C13 M90 Y81 K48
R129 G31 B29
HEX #811F1D

GREEN

Pantone 7479
C69 M0 Y70 K0
R68 G186 B124
HEX #44BA7C

DEEP GREEN

Pantone 7724
C82 M6 Y67 K15
R12 G150 B111
HEX #0C966F

TEAL

Pantone 7466
C89 M2 Y30 K0
R0 G174 B187
HEX #00AEBB

BRIGHT BLUE

Pantone 305
C57 M0 Y6 K0
R86 G201 B234
HEX #56C9EA

Secondary

This palette should only be used in a supporting capacity, in conjunction with one of the primary colours.

BLACK

Pantone® Black
C0 M0 Y0 K100
R0 G0 B0
HEX #000000

SLATE

Pantone Cool Grey 9
C28 M22 Y21 K44
R118 G120 B122
HEX #76787A

CONCRETE

Pantone 408
C12 M18 Y19 K37
R153 G142 B138
HEX #998E8A

GREY SKY

Pantone 7541
C9 M5 Y5 K5
R220 G224 B228
HEX #DCE0E4

CHOCOLATE

Pantone 4715
C18 M49 Y53 K31
R154 G106 B88
HEX #9A6A58

VIOLET

Pantone 7439
C28 M52 Y0 K0
R183 G135 B189
HEX #B787BD

BLUE SKY

Pantone 644
C33 M16 Y2 K7
R158 G182 B213
HEX #9EB6D5

SALMON

Pantone 1635
C0 M56 Y55 K0
R245 G139 B111
HEX #F58B6F

CUSTARD

Pantone 134
C0 M18 Y67 K0
R255 G209 B109
HEX #FFD16D

Our Type

There are two typefaces that we use in our communications - FF Mark is used for large and bold type whenever impact or emphasis is required. Univers is used for all supporting type where readability (for body copy) is required.

Digital Communications.
Where the brand typefaces are not available (eg Email or internal Word documents), please revert to Arial.

FF Mark has real presence, especially at larger sizes. It's available to buy at Fontshop.com

Big words FF Mark

Light	AaBbCbDdEeFfGgHhIiJjKkLlMm
Regular	NnOoPpQqRrSsTtUuVvWwXxYyZz
Bold	1234567890#@£€%@*()_+<>;:!

Univers is a classic font that pairs well with FF Mark. It's available to buy at Linotype.com

Tiny words Univers

Light
Regular
Bold

AaBbCbDdEeFfGgHhIiJjKkLlMm
NnOoPpQqRrSsTtUuVvWwXxYyZz
1234567890#@£$%@*()_+<>;:!

Do

We've avoided having too many rules, it's more about what you can do than what you can't.

KEEP THINGS SIMPLE
USE HIGH QUALITY IMAGES
WRITE LIKE YOU SPEAK
MAKE IT FEEL PERSONAL
HELP PEOPLE TO DO MORE
CELEBRATE OUR UNIQUE STRENGTHS
KEEP YOUR AUDIENCE IN MIND
BE SOCIAL (AND SOCIABLE)
ASK FOR HELP!

By investing in and protecting our brand we maximise its value and positive impact on the world.

Don't

REDRAW MASTER ARTWORK (ONLY USE THE ORIGINALS)
OVERCOMPLICATE THINGS
USE JARGON OR BUSINESS-SPEAK
BE DULL OR BORING
BE ARROGANT OR OVERPROMISE
COMPARE US TO OTHER PLACES
GET INVOLVED IN ARGUMENTS

Our Imagery

The best images are genuine and spontaneous, connecting our amazing city with the people who come here to experience it.

Our use of photography is straightforward and informative, designed to show off Exeter in its best light to people who may be unfamiliar with the city.








CITY COUNCIL
ALBERT
MUSEUM
GALLERY


in Cox Jewellery


SuperdryStore

In use. Examples

If you've created something using our brand that you're proud of, we'd love to see it.

A growing collection of communications and materials that connect our brand to our audiences in inspiring and creative ways.

Visit Exeter Identity
In Use. Guide Cover.

Page 96

Visit Exeter Identity
In Use. Outdoor Display.

Page 98

Further Help?

The Visit Exeter brand identity was designed by Believe in®. All technical queries, feedback and suggestions are gratefully received. Thank you.

exeter@believein.net
www.believein.net

If you need any assistance using the Visit Exeter brand identity, please contact the Exeter City Council Economy and Tourism team at XXXX

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visit exeter

Media Pack 2017

start here

ex

start here

Managed by Exeter City Council, Visit Exeter is the official organisation responsible for the promotion of Exeter as a visitor destination. Our aim is to increase visitor trips and spend in the city, by positioning Exeter as a year round sustainable destination for a day visit, city break, business trip or group visit.

Exeter has seen some exciting developments in recent years, including the opening of the multi-million pound Queen St Dining in 2016 and major events coming to the area including Rugby World Cup 2015 and Radio 1's Big Weekend 2016. The future is looking bright with the regeneration of the city's bus station site to offer a new leisure and retail complex, and the Boat Shed, a £4million new creative space on Exeter's Quayside.

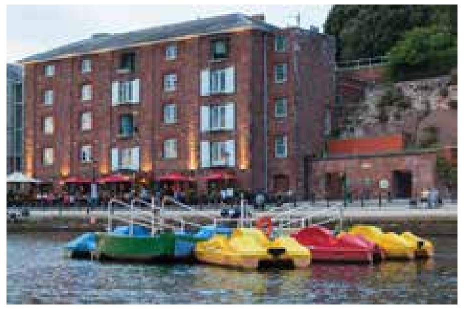
By working closely with Visit Devon and VisitBritain, and locally in collaboration with the Exeter BID and the Exeter Cultural Partnership, we will raise the profile of Exeter nationally and internationally, placing it firmly on the map as a leading cultural, sporting and activity destination.

Who we are

Exeter was previously marketed as part of the Heart of Devon Tourism Partnership. In September 2016, Heart of Devon formally merged with the Visit South Devon Area Tourism Partnership, leaving Exeter as a stand-alone city destination, with full support from Exeter City Council.

The team at Visit Exeter is part of the Council's Growth and Enterprise department, working together across sectors including business support and investment, events and festivals, and skills. The team works closely with the local business community through working groups, networking and regular communication to be aware of issues, and take action or lobby on businesses' behalf.

Following extensive industry and consumer research, Visit Exeter will be launched in 2017 with a fresh new brand, reflecting the city's identity as a stylish destination strengthened by its heritage and its proximity to the coast and countryside.



On and offline marketing

www.visitexeter.com will be relaunched in early 2017 with a brand new design and enhanced functionality, including online availability and booking, enhanced mapping features and an integrated blog. Using the new brand alongside high quality imagery and engaging content, the new website will aim to inspire visitors to make a visit to Exeter in 2017 and beyond.

The website currently receives over 600k annual page views. Through a targeted online marketing campaign we expect to grow website visitor numbers by 25% year on year.

Activity will include:

- search engine optimisation
- social media
- consumer e-newsletters
- creating engaging content in collaboration with journalists and bloggers
- working in partnership with Visit Devon and VisitBritain
- advertising with targeted publications and websites
- attending national events and exhibitions

Social media following

- Facebook >6k followers
- Twitter >15k followers
- Instagram – launched Sept 2016

Work with us

Join Visit Exeter today to reach more customers and be part of a global destination marketing campaign. Financial and staff support from Exeter City Council means that 100% of membership income goes directly into promoting the city, allowing for maximum return on your investment with us.

By becoming a member, you will have the opportunity to directly benefit from our regional, national and international campaigns of advertising, press and PR.

We offer three levels of membership – Bronze, Silver and Gold, with ALL members receiving the following promotional and business support as part of their membership:

Marketing:

- Preferential involvement in our marketing campaigns, press & PR activity including press visits & competitions
- Promotion through Visit Exeter's social media channels
- Access to sponsorship opportunities for industry events/exhibitions and marketing campaigns
- Opportunity to stand-share at regional and national exhibitions

Business support

- Regular members e-newsletter with industry news and updates
- Access to networking events organised by Visit Exeter
- Lobbying and representation through partnership working with Exeter City Council, Visit Devon and VisitBritain on local, regional and national industry matters
- Access to subsidised training courses
- Access to Visit Exeter image library and video content for use in your own promotional materials

In addition to the above, members will receive an entry on www.visitexeter.com.
Please see overleaf for membership package online features.
Please see overleaf for membership package online features.

Membership packages

INCLUDED ADVERTISING OPTIONS	Bronze	Silver	Gold
	£150 +VAT	£300 +VAT	£600 +VAT
Listing Details Listing details on www.visitexeter.com: Address, telephone number, email address, opening times, pricing, directions, facilities, awards & grading's	✓	✓	✓
Number of Pictures These images may be changed throughout your membership	4	8	20
Description	500 words	unlimited	unlimited
Priority in Search Result	3rd	2nd	1st
Press and PR/Social Media Inclusion in Press & PR opportunities including press visits & competition prizes. Promotion through VSD Social Media & Blogs	✓	✓	✓
Visit Devon Discounted entry on www.visitdevon.co.uk and involvement in all related marketing activity	✓	✓	✓
Trip Advisor Trip Advisor reviews appear alongside your listing*		✓	✓
Blogs Opportunity to submit guest blogs on www.visitexeter.com, promoted through our social media channels		✓	✓
Online Booking Availability search & online booking (if applicable) OR link to own online booking website		✓	✓
What's Nearby Carousel Placement in the What's Nearby Carousel		✓	✓
Special Offers on Website Inclusion in special offers section		✓	✓
Social Media Your own social media feed displayed on web listing		✓	✓
Themed Campaigns Inclusion in listings on themed campaign landing pages where relevant, e.g. romantic breaks, activity breaks etc.		✓	✓
Must See Section Appear in Must See Exeter section on homepage			✓
Gallery Image Gallery image in relevant section of website, e.g. Hotels in Exeter, Restaurants in Exeter			✓
Top Level Navigation Placement in top level navigation on www.visitexeter.com			✓
Additional Listings Additional listings for other parts of your business, e.g. accommodation, restaurant, spa etc. (normally £50 per additional listing)	£50 each	£50 each	✓
Themed Campaings Featured on themed campaign landing pages where relevant			✓
Brochure / menu/ event download			✓
Consumer Newsletter Sponsored post on 1 Visit Exeter consumer e-newsletter			✓
Social Media Sharing Shared posts on Visit Exeter's Facebook and Twitter feeds			✓
Video Content on Your Listing		✓	✓
Sponsorship Opportunities Priority access to sponsorship opportunities, attendance at events/exhibitions, press and advertising opportunities			✓
Button Advertising Button advert on www.visitexeter.com for 2 months, plus 20% discount on further banner advertising	£200 per month	£200 per month	✓

ALL members will receive the following promotional and business support as part of their membership:

Marketing:

- Preferential involvement in our marketing campaigns, press & PR activity including press visits & competitions
- Promotion through Visit Exeter's social media channels
- Access to sponsorship opportunities for industry events/exhibitions and marketing campaigns

Business support

- Members monthly e-newsletter with industry news and updates
- Access to networking events organised by Visit Exeter
- Lobbying and representation through partnership working with Exeter City Council, Visit Devon and VisitBritain on local, regional and national industry matters
- Access to subsidised training courses
- Access to Visit Exeter image library and video content for use in your own promotional materials

Business supporters package £100 + VAT

For non-tourism businesses, e.g. solicitors, finance companies etc.

- Access to Visit Exeter networking events and opportunities
- Regular feature on Visit Exeter members e-newsletter
- 20% discount on website banner advertising on www.visitexeter.com

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Final

REPORT TO: **Place Scrutiny Committee and Executive**
Date of Meeting: **9 March and 11 April 2017**
Report of: **Service Manager Community Safety & Enforcement**
Title: **Parking Tariffs**

Is this a Key Decision? *

Yes

**One that affects finances over £1m or significantly affects two or more wards. If this is a key decision then the item must be on the appropriate forward plan of key decisions.*

Is this an Executive or Council Function?

Executive.

1. What is the report about?

Increasing both car park tariffs and the number of pay & display parking sites from June 2017.

2. Recommendations:

2.1 To amend the Car Parking Places Order 2014 as follows:

1. To increase tariffs at Premium, Zone 1 and Zone 2 car parks by 10% within the existing linear pricing structure as set out in the table below but retain the existing all day tariff to encourage visitor dwell time:-

Premium Car Parks (Guildhall, Mary Arches, John Lewis)		
Stay	Current Tariff	Proposed Tariff
1 hour	£2.00	£2.20
2 hours	£3.00	£3.30
3 hours	£4.00	£4.40
4 hours	£5.00	£5.50
5 hours	£6.00	£6.60
6 hours	£7.00	£7.70
7 hours	£8.00	£8.80
All day	£12.00	£12.00
Zone 1 Car Parks (Bampfylde Street, Bartholomew Terrace, Harlequins, King William Street, Magdalen Road, Magdalen Street, Matthews Hall, Princesshay 2, Princesshay 3, Smythen Street)		
Stay	Current Tariff	Proposed Tariff
1 hour	£1.00	£1.10
2 hours	£2.00	£2.20
3 hours	£3.00	£3.30
4 hours	£4.00	£4.40
5 hours	£5.00	£5.50

6 hours	£6.00	£6.60
7 hours	£7.00	£7.70
All day	£10.00	£10.00
Zone 2 Car Parks (Belmont Road, Bystock Terrace, Cathedral & Quay, Haven Road 1, Howell Road, Richmond Road, Parr Street, Topsham Quay, Triangle)		
Stay	Current Tariff	Proposed Tariff
1 hour	£1.00	£1.10
2 hours	£2.00	£2.20
3 hours	£3.00	£3.30
4 hours	£4.00	£4.40
5 hours	£5.00	£5.50
All day	£6.00	£6.00
Zone 3 Car Parks (Flowerpot, Haven Road 2 & 3, Holman Way, Okehampton Street, Tappers Close)		
Stay	Current Tariff	Proposed Tariff
1 hour	£0.50	£0.50
2 hours	£1.00	£1.00
3 hours	£1.50	£1.50
4 hours	£2.00	£2.00
All day	£2.50	£2.50
Zone 3 Car Parks with Maximum Stay (Clifton Hill, Gordons Place, Station Road (Exwick))		
1 hour	£0.50	£0.50
2 hours	£1.00	£1.00
3 hours maximum stay	£1.50	£1.50
Coach Parking at Haven Road 3 (per day)	£5.00	£5.00
Quarterly Commuter Season Ticket	£300.00	£300.00
Residents Annual Season Ticket	£125.00	£125.00
Bartholomew Terrace Business Permit	£205.00	£205.00
Cathedral & Quay Business Bays	£565.00	£565.00

2.2 To include the following additional car parks in the Parking Places Order 2014:
(a) Flowerpot (Appendix 1)
(b) Station Road (Exwick) (Appendix 2) and
(c) Clifton Hill (Appendix 3)
by way of pay and display

2.3 To designate the following car parks as Zone 3 Car Parks as set out in paragraph 2.1 above table in the Parking Places Order 2014:
(a) Flowerpot,
(b) Station Road (Exwick) and
(c) Clifton Hill

2.4 To restrict parking to a maximum 3 hour stay at the new Clifton Hill and Station Road (Exwick) car parks.

3. Reasons for the recommendations:

3.1 Parking charges within the city have fallen behind other cities and the Council has ambitious plans to reduce congestion in the city. A reasonable pricing policy will support these objectives.

3.2 Costs have risen with the rise of payment by credit and debit cards, along with mobile phone payment charges. Increased tariff charges will negate the need to introduce a separate surcharge and cover these additional costs.

3.3 To reduce anomalies in parking provision by operating all pay and display sites in-house under a Parking Places Order.

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

Based on historical ticket data, and assumptions on changes to parking patterns resulting from the new charging structure, the projected impact of the recommended tariff increase is an additional £680,000 income per annum (Appendix 4).

5. Section 151 Officer comments:

The report raises no concerns for the section 151 officer. As the figures can only be estimates, Finance will work with Parking Services to produce a budget that is realistic and achievable rather than simply adding this estimate to the existing budget.

6. What are the legal aspects?

Any changes to the Council's Parking Places Order must be advertised and any comments received as a result must be carefully considered.

7. Monitoring Officer's comments:

This report raises no issues for the Monitoring officer.

8. Report Details:

Tariff Increase

8.1 There have been no 'across the board' percentage increases in parking tariffs since 2012. As a result, parking charges within the City have fallen behind the charges of other Cities. With a stated aim of reducing congestion in the City, the Council cannot help support this objective without a reasonable increase in tariff.

8.3 A new tariff structure was introduced in January 2017. The proposed changes in this report do not seek to alter that structure but instead simply raise tariffs within it, maintaining a linear approach.

8.4 Even with this 10% increase on most tariffs parking prices in Exeter will still compare favourably with other regional centres (Plymouth £1.20 - £1.30 per hour and Taunton £1.00 - £1.20 per hour)

8.5 It is projected that during 2016/17, there will be 311,000 card transactions at our pay and display machines at an average transaction fee of 26 pence. Rather than introduce a surcharge at this time, it would be more appropriate for the additional costs to be absorbed within the tariff increase. It is anticipated that the number of card transactions will continue to rise.

Additional Sites

8.6 Lease agreements for Flowerpot and Station Road (Exwick) cease in March and May 2017 respectively. Both sites are currently run by private parking operator Premier Park and sit outside of the Council's Parking Places Order.

8.7 The Flowerpot site will need to operate as an unregulated free car park for the period March – May prior to inclusion in the Parking Places Order which allows the Council to charge and enforce in accordance with its amended Parking Place Order.

8.8 The current 6 dedicated resident permit bays will become public bays and instead the permit holders will be entitled to park anywhere within Flowerpot car park.

8.9 The Station Road (Exwick) site will pass from Premier Park to the Council in May and will be included in the amended Parking Places Order.

8.10 A maximum stay of 3 hours will be imposed at Station Road (Exwick) to deter rail commuters parking all day to the detriment of those wishing to park for a short period of time to use the adjacent park or enjoy the nearby river walks.

8.11 A small parcel of Council land adjacent to Clifton Hill Sports Centre is currently operated by Premier Park and offers 10 bays on a permit holder parking only basis. There is no take up of the permits and the bays remain empty. The land is not included in the Council's Parking Places Order and the existing agreement with Premier Park can be terminated with 60 days written notice.

8.12 This small area would be better incorporated into the Parking Places Order and utilised as a Zone 3 pay and display car park with a 3 hour maximum stay. This would provide an overspill parking option for the sports centre as well as increasing bay availability for users of nearby Belmont Park.

8.13 In addition these bays could be utilised by visitors to properties in this area of Newtown who are prevented from parking on the street by the County Council's Residents Parking scheme.

9. 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?

9.1 Maintaining free parking for Blue Badge Holders supports equality of access to the city.

10 Are there any other options?

10.1 Maintain existing tariffs and make additional income or savings in other areas.

Steve Carnell
Service Manager Community Safety & Enforcement

Local Government (Access to Information) Act 1972 (as amended)
Background papers used in compiling this report:-

Contact for enquires:

Democratic Services (Committees)
Room 2.3
01392 265115

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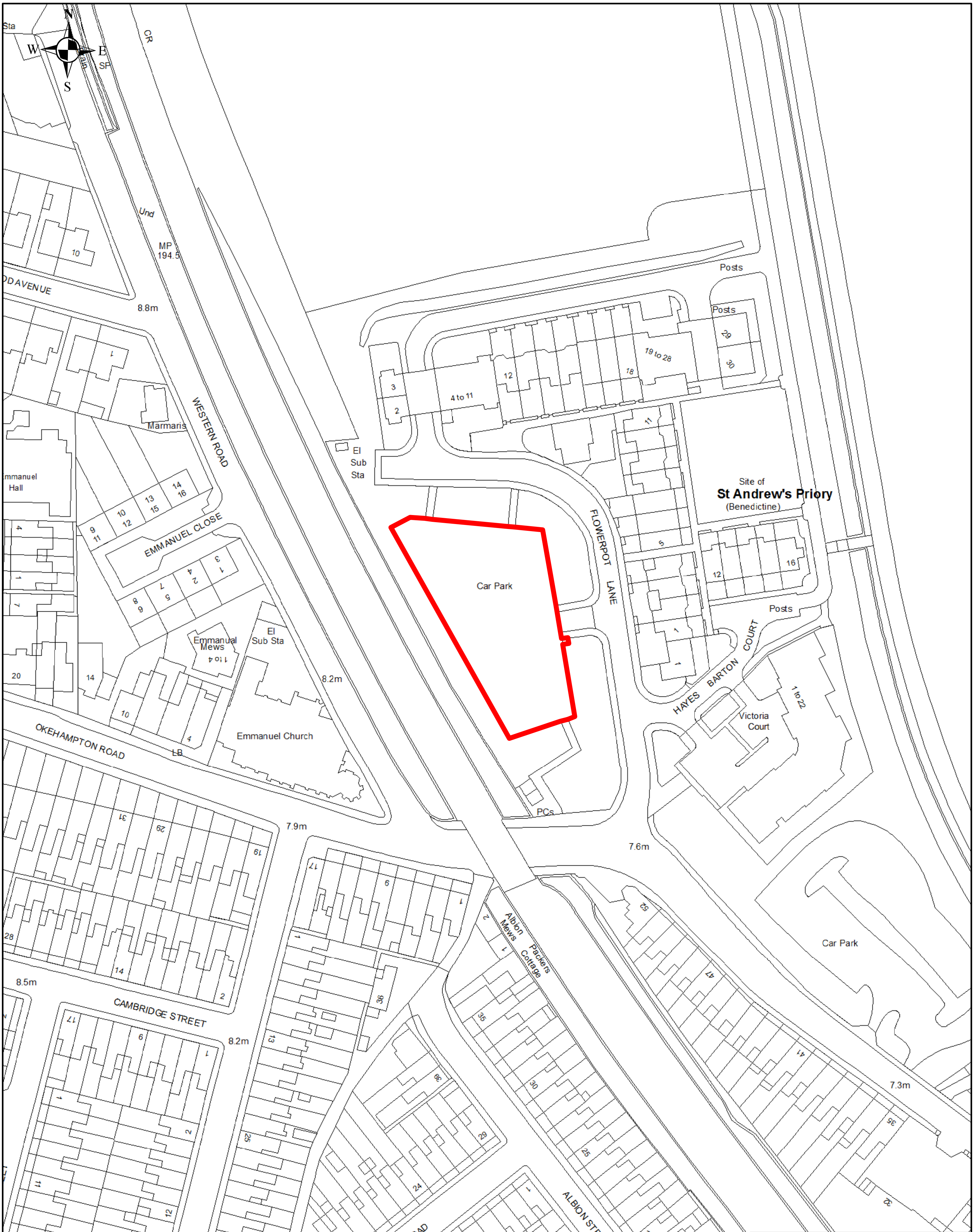

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Flowerpot Car Park

Exeter City Council

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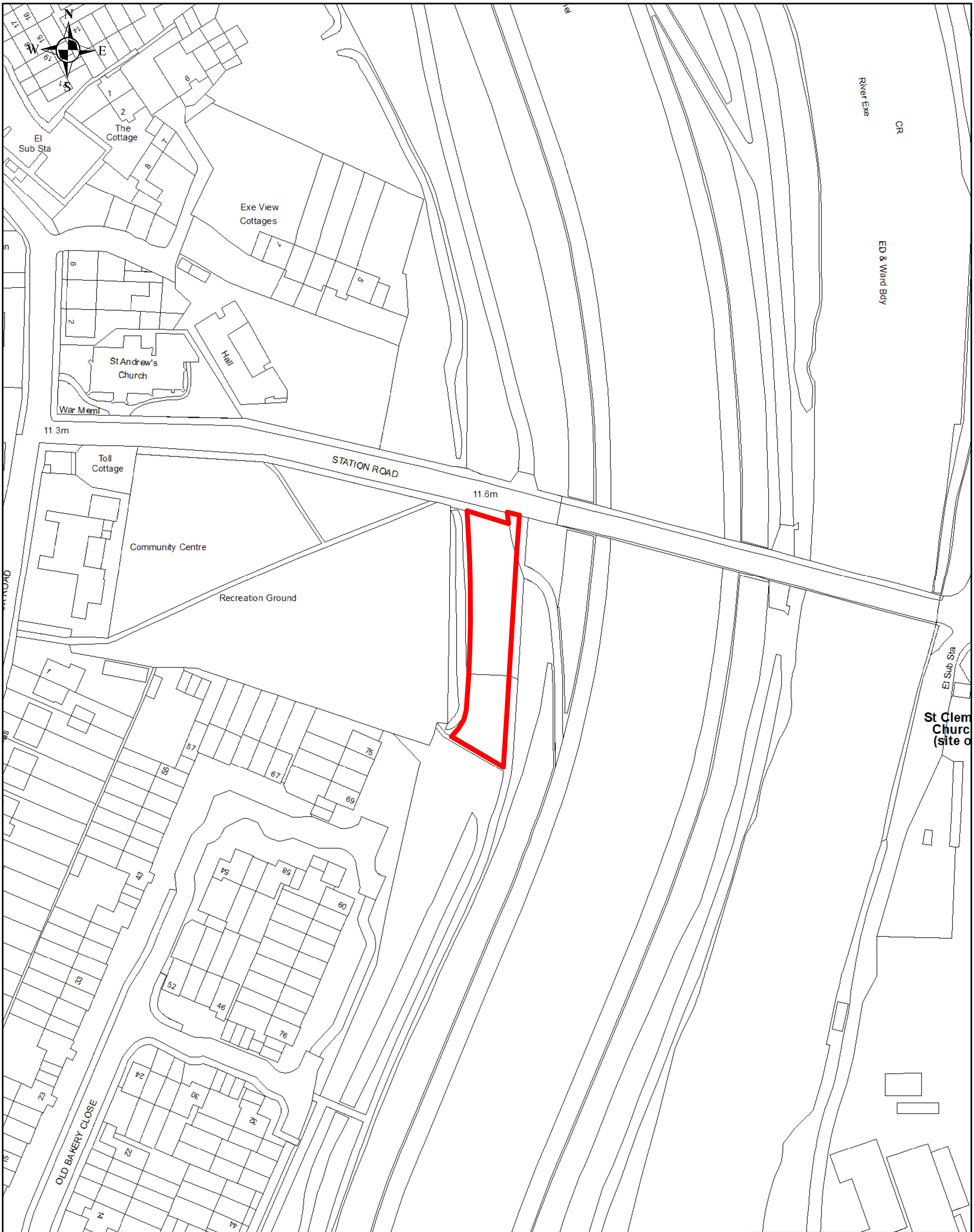

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Station Road, Exwick Car Park

Exeter City Council

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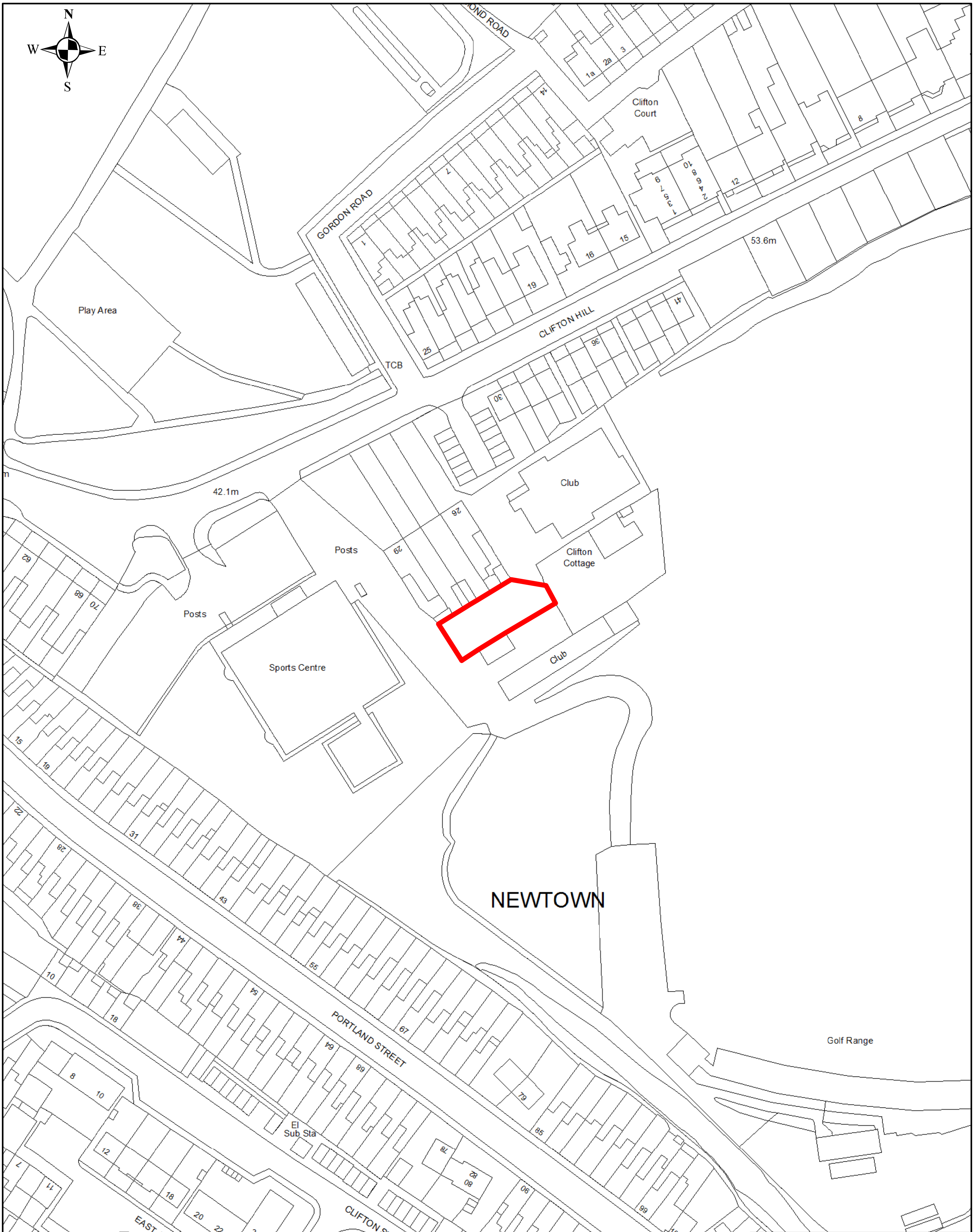

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Clifton Hill Car Park

Exeter City Council

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	2015/16 Actual Data			Projected Figures Using Proposed Tariffs					Projected Figures Using Proposed Tariffs		
Premier	Current Tariff	Tickets Sold	Income	Proposed Tariff	Tickets Sold	Income	Assumption	Impact	Proposed Tariff	Tickets Sold	Income
1 hr	£ 1.80	196,970	£ 354,546	£ 2.00	213,047	£ 426,094		16077	£ 2.20	213,047	£ 468,703
2 hr	£ 2.60	321,546	£ 836,020	£ 3.00	305,469	£ 916,407	5% to 1 hr	-16077	£ 3.30	305,469	£ 1,008,048
3 hr	£ 3.50	224,677	£ 786,370	£ 4.00	202,210	£ 808,840	10% to 4 hr	-22467	£ 4.40	202,210	£ 889,724
4 hr	£ 6.50	105,802	£ 687,713	£ 5.00	117,689	£ 588,445	10% to 5 hr	11887	£ 5.50	117,689	£ 647,290
5 hr	£ 8.80	44,658	£ 392,990	£ 6.00	53,006	£ 318,036	5% to 6 hr	8348	£ 6.60	53,006	£ 349,840
6 hr	£ 11.80	26,727	£ 315,379	£ 7.00	11,473	£ 80,311	5% to 7 hr	1746	£ 7.70	11,473	£ 88,342
7 hr	£ 11.80			£ 8.00	11,086	£ 88,688		2086	£ 8.80	11,086	£ 97,557
All day	£ 11.80			£ 12.00	6,400	£ 76,800	10% to 7 hr	-1600	£ 12.00	6,400	£ 76,800
Short											
1 hr	£ 1.20	253,118	£ 303,742	£ 1.00	253,118	£ 253,118			£ 1.10	253,118	£ 278,430
2 hr	£ 2.20	297,882	£ 655,340	£ 2.00	297,882	£ 595,764			£ 2.20	297,882	£ 655,340
3 hr	£ 3.30	188,476	£ 621,971	£ 3.00	169,628	£ 508,885	10% to 4 hr	-18847	£ 3.30	169,628	£ 559,772
4 hr	£ 5.70	46,140	£ 262,998	£ 4.00	62,681	£ 250,722	5% to 5 hr	16540	£ 4.40	62,681	£ 275,796
5 hr	£ 7.70	20,258	£ 155,987	£ 5.00	21,552	£ 107,761	5% to 6 hr	1294	£ 5.50	21,552	£ 118,536
6 hr	£ 10.80	19,697	£ 212,728	£ 6.00	7,697	£ 46,182		1013	£ 6.60	7,697	£ 50,800
7 hr	£ 10.80			£ 7.00	7,000	£ 49,000			£ 7.70	7,000	£ 53,900
All day	£ 10.80			£ 10.00	6,000	£ 60,000			£ 10.00	6,000	£ 60,000
Long											
1 hr	£ 0.80	76,773	£ 61,418	£ 1.00	76,773	£ 76,773			£ 1.10	76,773	£ 84,450
2 hr	£ 1.20	139,396	£ 167,275	£ 2.00	139,396	£ 278,792			£ 2.20	139,396	£ 306,671
3 hr	£ 1.80	173,054	£ 311,497	£ 3.00	173,054	£ 519,162			£ 3.30	173,054	£ 571,078
4 hr	£ 3.20	74,128	£ 237,210	£ 4.00	74,128	£ 296,512			£ 4.40	74,128	£ 326,163
5 hr	£ 5.00	37,630	£ 188,150	£ 5.00	37,630	£ 188,150			£ 5.50	37,630	£ 206,965
All day	£ 6.20	44,451	£ 275,596	£ 6.00	44,451	£ 266,706			£ 6.60	44,451	£ 293,377
Local											
1 hr	£ 0.60	13,868	£ 8,321	£ 0.50	13,868	£ 6,934			£ 0.50	13,868	£ 6,934
2 hr	£ 0.80	13,497	£ 10,798	£ 1.00	13,497	£ 13,497			£ 1.00	13,497	£ 13,497
3 hr	£ 1.00	31,792	£ 31,792	£ 1.50	31,792	£ 47,688			£ 1.50	31,792	£ 47,688
4 hr	£ 1.20	11,407	£ 13,688	£ 2.00	11,407	£ 22,814			£ 2.00	11,407	£ 22,814
All day	£ 1.80	29,535	£ 53,163	£ 2.50	29,535	£ 73,838			£ 2.50	29,535	£ 73,838
Evening	£ 2.00	52,000	£ 104,000	£ 4.00	39,000	£ 156,000	25% less	-13000	£ 4.40	39,000	£ 171,600
									New Sites	Estimated	Income
									Flowerpot		£ 25,000
									Station Rd		£ 2,000
									Clifton Hill		£ 1,000
			£ 7,048,691		2,391,469	£ 7,121,919	£ 73,228	-13000		2,391,469	£ 7,803,953

APPENDIX 4

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Final

REPORT TO: **SCRUTINY COMMITTEE PLACE**
Date of Meeting: **9 MARCH 2017**
Report of: **Assistant Director Finance**
Title: **BUDGET MONITORING REPORT TO 31 DECEMBER 2016**

Is this a Key Decision?
No

Is this an Executive or Council Function?
No

1. What is the report about?

This report advises Members of any material differences to the revised budget in respect of the Place Scrutiny Committee revenue and capital budgets.

Potential areas of budgetary risk are also highlighted in this report, so that Members are aware that certain budgets have been identified as being vulnerable to factors beyond the control of the Council, which may result in potential deviations from budget, and are therefore subject to close monitoring by officers.

2. Recommendations:

That Members of Scrutiny Committee – Place assure themselves that Officers review areas with significant variances and undertake the necessary actions to address the issues that the variances may cause.

3. Reasons for the recommendation:

Local authorities have a statutory duty to set and monitor their budgets during the year and to take any actions necessary because of potential overspending or potential shortfalls in income. Members are therefore presented with a quarterly financial update in respect of Place Services Scrutiny Committee and this is the first report for 2016-17.

4. What are the resource implications including non financial resources

The financial resources required to deliver Place Services during 2016-17 are set out in the body of this report.

5. Section 151 Officer comments:

This report has been prepared on behalf of the Section 151 Officer to set out the projected financial position of Place Services as at 31 March 2017.

6. What are the legal aspects?

Part 2 of the Local Government Act 2003 provides the legislative framework for the process of setting and managing budgets. In particular, Section 28 of the 2003 Act requires local authorities to monitor their budgets during the financial year.

7. Monitoring Officer's comments:

This report raises no issues for the Monitoring Officer.

8. Report Details:

Place Services Scrutiny Committee Budget Monitoring to 31 December 2016

8.1 **Key Variations from Budget**

The current forecast suggests that net expenditure for this committee will decrease from the revised budget by a total of £215,794 after transfers from reserves and revenue contributions to capital, as detailed in Appendix 1. This represents a variation of 2.20**%** from the revised budget. This includes supplementary budgets of £1,117,370 already agreed by Council.

8.2 The significant variations by management are:

MU Code	Management Unit	Over / (Underspend)	Detail
81A6	Parks & Green Spaces	(108,770)	• Underspend on pay due to vacant posts. • Additional income from disposal assets (vehicle & plant sales less than £10k), S106 income and rental income from park properties.
81C9	Assistant Directors	287,000	• Due to redundancy costs associated with the implementation of the Senior Management Re-structure
81D4	Street Cleaning	157,510	• Projected overspend on pay budgets, this is partially offset by the pay underspend in Parks & Green Spaces • The cost of Graffiti Cleaning is anticipated to exceed the budget. The overspend is expected on pay and materials. • There is an underspend expected on fleet budgets.
81D6	Cleansing Chargeable Services	63,300	• The overspend is due to income from the trade refuse and recycling services being below target, together with some increased transport expenditure.
83A3	Car Parking	(501,370)	• Income from off street parking fees anticipated to exceed budget, partially offset by additional expenditure on equipment tools and materials. • The budget in respect of the transactions charges for paybyphone and credit cards will be exceeded.
83A4	Economic Development	(38,800)	• The underspend is due to vacancies, partially offset by Tourism overspend.
83A5	Arts & Events	69,200	• The overspend is mainly due to increased expenditure associated with special events.
83B8	Major Projects	(27,740)	• The budget funds the legal team and property consultants engaged to deliver the property transactions required to bring forward the Bus & Coach Station redevelopment. This work has ramped up this year and the initial budget was inadequate to meet these demands. • The costs incurred are recoverable and it is anticipated that £98k will be received before the end of the financial year.

MU Code	Management Unit	Over / (Underspend)	Detail
83B9	Markets & Halls	51,000	• Owing to a delay in the installation of the solar panels at the Matford Centre the income is anticipated to be below budget. In addition, income from ticket sales, and ancillary sales at the Corn Exchange, is below target, as is income from room bookings and business units at the Matford Centre.
83C2	Museum Service	59,000	• After a transfer from reserves of £29k, the anticipated overspend of £30k is mainly due to the RAMM shop opening later than originally anticipated.
83C3	Contracted Sports Facilities	100,800	• Revenue expenditure associated with the new sports centre complex has been brought forward into 2016/17 from future years. This will be funded from a transfer from reserves.

9. **Place Capital Budget Monitoring to 31 December 2016**
To report the current position in respect of the Place Capital Programme and to update Members with any anticipated cost variances, acceleration of projects or slippage of schemes into future years.

9.1 **Revisions to the Place Capital Programme**
The 2016/17 Capital Programme, including commitments brought forward from 2015/16 was last reported to Place Scrutiny Committee on 10 November 2016. Since that meeting the following changes have been made to the programme:

Description	£	Approval/Funding
Capital Programme, as reported to Place Scrutiny Committee, 10 November 2016	**4,685,550**	
Budget Accelerated from 2017/18 at Quarter 2	10,430	Approved by Council 13 December 2016
Revised Capital Programme	**4,875,980**	

9.2 **Performance**
The Place Capital Programme is detailed in Appendix 2. The appendix shows a total spend of £2,459,655 in 2016/17 with £163,720 of the programme potentially deferred to 2017/18 and beyond.

9.3 **Capital Variances from Budget**
The main variances and issues concerning expenditure in 2016/17 are:

Scheme	Estimated Overspend / (Underspend) £	Reason

Guildhall, John Lewis and Mary Arches MSCP Alarms	(90,000)	In line with the property maintenance strategy a full fire risk assessment has been undertaken at these sites to determine need in accordance with compliance legislation. The outcome of the assessments is that only minor alterations are required and these can be funded for existing reactive budgets.
Budlake Road Resurfacing	(50,000)	The budget was provided on the condition that the road was brought up to a standard acceptable to DCC for adoption. Their survey revealed that this would cost in the region of £160k. The project is not therefore achievable.

9.4 **Capital Budgets Deferred to 2017/18 and Beyond**

Schemes which have been identified as being wholly or partly deferred to 2017/18 and beyond are:

Scheme	**16/17 Budget £**	**Budget to be Deferred £**	**Reason**
Play Area Refurbishments	153,830	75,000	This code holds the funds for nine projects. One of these relates to an area which has just been transferred to us by DCC. We have to now go out to tender and public consultation. The second project is waiting for consent from Railtrack.
Exhibition Way Bridge Maintenance	39,580	39,580	We are waiting the DCC bridge inspectors report. If the future of the bridge is pedestrian / light traffic the budget may well be sufficient to undertake repairs. If the land is to be developed the cost of a load bearing structural repair over a railway line could cost four times the amount budgeted.
Repair Canal Bank at M5	44,550	40,000	We are working with the RSPB, Environment Agency and Natural England to agree a Habitat Regulations Assessment. This is a SSSI and the window within works are permitted are very limited, hence anticipated completion is now delayed until next winter.

Heavitree Church Retaining Wall	55,000	30,000	The area of wall that is bulging out will be completed by March. This is a very old wall structurally it is likely that once the initial area is exposed the adjacent areas will break free. We anticipate a domino effect and the final costs will be determined by the extent of works necessary to achieve stability.
Bus Station Construction	1,096,580	30,710	Both projects are still on schedule, these amounts reflect minor variations in the profiling of the budget to reflect actual expenditure to date plus expected future expenditure.
Leisure Complex – Build Project	1,362,800	(73,570)	

10. How does the decision contribute to the Council's Corporate Plan?
Place Committee contributes to 6 key purposes, as set out in the Corporate Plan; a stronger city, keep place looking good, keep me / my environment safe and healthy, provide great things for me to see and do, help me run a successful business and deliver good development

11. What risks are there and how can they be reduced?
Areas of budgetary risk are highlighted to committee as part of the quarterly budget monitoring updates. An action plan to address the key areas of budgetary risks within Place was reported in March 2016 and is attached as Appendix 3, for reference only.

12. What is the impact of the decision on equality and diversity; health and wellbeing; safeguarding children, young people and vulnerable adults, Economy safety and the environment?
No impact

13. Are there any other options?
No

DAVE HODGSON
Assistant Director Finance

Author: Marie Holt / Paul Matravers

Local Government (Access to Information) Act 1972 (as amended)
Background papers used in compiling this report:
None

Contact for enquiries:
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APPENDIX 1

PLACE SCRUTINY COMMITTEE
BUDGET MONITORING

APRIL 2016 TO DECEMBER 2016

ACTUAL TO DATE					YEAR END FORECAST				
PROFILED BUDGET	ACTUAL TO DATE	VARIANCE TO DATE	CODE		APPROVED BUDGET	CURRENT OUTTURN FORECAST	FORECAST VARIANCE	QTR 2 FORECAST VARIANCE	QTR 1 FORECAST VARIANCE
£	£	£			£	£	£	£	£
199,522	167,361	(32,161)	81A1	ENVIRONMENTAL PROTECTION	386,640	380,740	(5,900)	0	(3,000)
125,673	95,502	(30,171)	81A3	LICENCING,FOOD,HEALTH & SAFETY	363,920	359,520	(4,400)	0	(7,680)
199,739	177,102	(22,637)	81A4	PUBLIC SAFETY	457,670	471,230	13,560	8,540	5,000
740,427	712,049	(28,378)	81A6	PARKS & GREEN SPACES	966,680	857,910	(108,770)	27,010	27,010
268,644	143,326	(125,319)	81B&C	BUSINESS & COMMERCIAL OPS	438,950	466,230	27,280	7,540	0
242,501	147,414	(95,087)	81B2	CEMETERIES OPERATIONAL	206,700	204,510	(2,190)	0	0
138,259	142,856	4,597	81C9	ASSISTANT DIRECTORS	0	287,000	287,000	0	0
1,270,729	1,302,438	31,709	81D2	DOMESTIC REFUSE COLLECTION	2,070,470	2,045,570	(24,900)	(23,400)	0
1,107,933	1,355,971	248,038	81D4	STREET CLEANING	1,454,480	1,611,990	157,510	25,940	25,940
123,790	114,369	(9,421)	81D5	PUBLIC CONVENIENCES	158,880	170,250	11,370	4,000	4,000
(272,280)	(279,316)	(7,036)	81D6	CLEANSING CHARGEABLE SERVICES	(316,320)	(253,020)	63,300	85,500	42,500
135,276	139,509	4,233	81D7	EXTON ROAD OVERHEADS AND FLEET	215,010	229,010	14,000	7,400	0
164,518	60,439	(104,079)	81D8	RECYCLING	192,070	185,370	(6,700)	50,700	0
1,645,134	1,507,123	(138,011)	81F1	PUBLIC REALM ASSETS	3,027,720	3,009,580	(18,140)	20,610	0
30,104	24,739	(5,364)	83A2	TRANSPORTATION	46,460	60,920	14,460	0	0
(4,299,811)	(4,667,275)	(367,464)	83A3	PARKING SERVICES	(5,246,270)	(5,747,640)	(501,370)	(98,630)	(72,270)
497,593	320,943	(176,650)	83A4	ECONOMIC DEVELOPMENT	746,090	707,290	(38,800)	(28,900)	0
266,945	356,992	90,047	83A5	ARTS & EVENTS	335,100	404,300	69,200	24,900	24,950
252,548	239,271	(13,277)	83A6	TOURIST INFORMATION	410,070	430,670	20,600	4,900	0
(15)	(406)	(391)	83A8	DISTRICT HIGHWAYS & FOOTPATHS	700	700	0	0	0
(36,831)	(66,427)	(29,596)	83A9	BUILDING CONTROL	45,420	21,850	(23,570)	0	0
0	0	0	83B1	LAND DRAINAGE	15,900	15,900	0	0	0
528,185	461,273	(66,912)	83B5	PLANNING SERVICES	983,560	976,310	(7,250)	170,000	60,000
(24)	172	196	83B6	CONSERVATION	6,350	6,350	0	0	0
0	5,925	5,925	83B7	AFU	0	8,000	8,000	6,500	0
22,500	71,979	49,479	83B8	MAJOR PROJECTS	30,000	2,260	(27,740)	30,000	0
(424,202)	(609,842)	(185,640)	83B9	MARKETS & HALLS	(388,960)	(337,960)	51,000	76,500	0
(68,360)	(61,196)	7,164	83C1	WATERWAYS	65,080	65,550	470	0	0
1,397,803	1,365,528	(32,275)	83C2	MUSEUM SERVICE	2,250,660	2,309,660	59,000	69,800	0
12,862	116,594	103,732	83C3	CONTRACTED SPORTS FACILITIES	895,390	996,190	100,800	(25,000)	(25,000)
4,269,161	**3,344,414**	**(924,747)**		**NET EXPENDITURE**	**9,818,420**	**9,946,240**	**127,820**	**443,910**	**81,450**

TRANSFERS TO / (FROM) EARMARKED RESERVES	
83A2 - Transportation	(11,560)
83A9 - Building Control	(18,580)
83B7 - AFU	(6,500)
83C2 - Museum Service	(29,200)
81C9 - Assistant Directors	(176,974)
83C3 - Contracted Sports Facilities	(100,800)
REVENUE CONTRIBUTION TO CAPITAL	
OUTTURN FOR THE YEAR AFTER MOVEMENTS TO/FROM RESERVES	**9,602,626**
REVISED BUDGETS	**9,818,420**
ADJUSTED OUTTURN VARIANCE	**(215,794)**

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CAPITAL MONITORING TO 31 DECEMBER 2016

	2016/17 Capital Programme	2016/17 Spend to 31 December	2016/17 Forecast Spend	2016/17 Budget to be Carried Forward to 2017/18 and Beyond	2016/17 Programme Variances (Under)/Over
	£	£	£	£	£
PLACE					
KEEP PLACE LOOKING GOOD					
Play Area Refurbishments	153,830	62,135	78,830	75,000	
Topsham Recreation Ground	3,530	0	3,530		
Rougemont Gardens - Path & Railings	37,000	195	37,000		
Exhibition Way Bridge Maintenance	39,580	0	0	39,580	
Canal Bank Repairs & Strengthening	5,750	1,111	5,750		
Repair to Turf Lock Gates	30,630	30,632	30,630		
Repair Canal Bank at M5	44,550	0	4,550	40,000	
Replace Car Park Ticket Machines	209,520	209,521	209,520		
Queen's Crescent CPO	18,000	0	18,000		
Canal Pontoon	26,220	3,244	26,220		
KEEP ME/MY ENVIRONMENT SAFE & HEALTHY					
Heavitree Church Retaining Wall	55,000	0	25,000	30,000	
Northernhay Driveway	60,000	0	60,000		
Vehicle Replacement Programme	600,000	538,367	600,000		
Mincinglake Reed Beds and Storage Ponds	6,530	4,148	6,530		
Guildhall, John Lewis & Mary Arches MSCP Fire Alarms	90,000	0	0		(90,000)
Car Park Surfacing - Haven Road	30,000	0	16,700	13,300	
Replace Lifts at Mary Arches MSCP	100,000	0	100,000		
Budlake Road Resurfacing	50,000	0	0		(50,000)
Farmers Market Electricity Supply	30,000	12,887	30,000		
Riverside Arches	60,000	0	60,000		
City Wide Property Level Protection	100,000	1,650	100,000		
Topsham - Bowling Green Marshes	40,000	0	40,000		

APPENDIX 2

		2016/17 Capital Programme	2016/17 Spend to 31 December	2016/17 Forecast Spend	2016/17 Budget to be Carried Forward to 2017/18 and Beyond	2016/17 Programme Variances (Under)/Over
		£	£	£	£	£
PROVIDE GREAT THINGS FOR ME TO SEE & DO						
Sports Facilities Refurbishment		92,550	4,118	92,550		
Passenger Lift at RAMM		75,000	1,120	75,000		
RAMM Shop		65,500	68,173	68,173		2,673
Livestock Centre Roof Replacement		7,380	0	7,380		
St Nicholas Priory		115,000	3,490	115,000		
MAINTAIN THE ASSETS OF OUR CITY						
RAMM Roof Access Improvements		68,500	0	68,500		
DELIVER GOOD DEVELOPMENT						
Newcourt Community Hall (S106)	Grants to	5,920	2,155	2,155		(3,765)
Newcourt Community Hall (Grant)	external	26,670	26,672	26,670		
Countess Wear - Village Hall	bodies	75,000	75,000	75,000		
Beacon Heath Martial Arts & Boxing Club - New Roof	(schemes	20,810	4,508	20,810		
Devonshire Place (Landscaping)	beyond	350	0	350		
Alphington Village Hall (Repairs & Extension)	ECC's	50,000	32,621	41,300	8,700	
St Sidwells Community Centre	control)	22,380	22,366	22,380		
Ibstock Environmental Improvements		1,400	1,020	1,400		
Bus Station Construction		1,096,580	581,927	1,065,870	30,710	
Leisure Complex - Build Project		1,362,800	772,595	1,436,370	(73,570)	
PLACE TOTAL		**4,875,980**	**2,459,655**	**4,571,168**	**163,720**	**(141,092)**

AREAS OF BUDGETARY RISK

The table below identifies areas that have been identified as a budgetary risk within the Place revenue and capital budgets.

The revenue budget areas of risk are:

Budget Title	Approved Budget	Risk
Revenue: Cemeteries	(£276,680)	The income budgets include various sources such as interment fees, rights of burial and headstone fees. To date the income received is marginally lower than profile. It should be noted that income was 11% below the annual budget in 2014-15 and 14% below annual budget in 2015-16. Income levels will continue to be monitored and the issue flagged to senior management if the trend of income continue as previous years.
Revenue: Cleansing Chargeable Services	(£345,700)	The majority of the income is subject to local and national markets with many competitors.
Revenue : Recycling	£192,070	The budgets include estimated income from the sale of reclaimed materials amounting to £730k. This income is subject to fluctuations in the market, and can be very volatile.
Revenue: Car Parking	(£5,763,000)	The fee income budget for car parking is £5.7m; figures to date indicate that this will be exceeded. The 2015-16 income was £6.28m meaning the budget was exceeded by 10%. Car Parking income can be volatile and a 3% shortfall in income would mean a shortfall of £173k against the budget. This is an ongoing budgetary risk. However, based on income to date, fee income is projected to be above the budget but the volatility of this income source should be noted.

Budget Title	Approved Budget	Risk
Revenue: Planning Services	737,960	There has been a number of recent planning decisions which have been appealed. This generally results in a need for external consultancy and legal advice. Significant expenditure has been incurred to date (£120k), the year end projection is currently £170k. However, this figure could increase substantially if further appeals are received.
Revenue: Markets & Halls	(£388,960)	The budgets for this service are reviewed annually by the Markets and Halls manager in consultation with the relevant Principal Accountant, and set at levels which are believed, at the time, to be realistic. In recent years, the Markets and Halls service has achieved better results than estimated; in 2015/16, the net income exceeded the budget by approximately £100,000. However, some sources of income cannot be guaranteed to continue at current or historical levels so there is a risk that the net income budget may not be achieved.

LEGACY LEISURE WORKING GROUP

Tuesday 21 February 2017

Present:-

Councillor Philip Bialyk (Chair)
Councillors Brimble, D Henson and Robson

Also Present

Events, Facilities and Markets Manager, Leisure Facilities Manager and Democratic Services Officer (Committees) (SLS)

Jeremy Wright – Legacy Leisure
Simeon Lewy - Legacy Leisure

1 SITE VISIT

Councillor Bialyk thanked colleagues at Legacy Leisure for an informative site visit of the Riverside Leisure Centre.

2 MINUTES OF THE MEETING ON 12 DECEMBER 2016 AND MATTERS ARISING

The minutes of the meeting held on 12 December 2016 were agreed as an accurate record of the meeting.

Steve Lyon confirmed that following an issue raised by Councillor Wood, the Manager, Karl Penman, Manager of Pyramids Swimming Centre had written to regular attendees to confirm that a new session for Disabled Users and 50+ would run between 2.30pm and 3.30pm each Friday. Jeremy Wright welcomed the session, and confirmed that they would continue to keep a watching brief on the use. Councillor Bialyk requested Councillor Wood be kept updated.

Steve Lyon confirmed that Simeon Lewry had identified a number of dates for the proposed Councillors' Activity evening which would provide an opportunity for Members to experience a number of activities at the Riverside Leisure Centre. Simeon Lewry suggested the programme should include a number of drop in, as well as more structured activities to run concurrently with the usual opening of the Centre. Councillor Brimble welcomed the opportunity to see the facilities offered which they could promote for the health and well-being benefit of the local community.

3 CUSTOMER COMMENTS FEEDBACK

Analysis of Comments January 2016 – January 2017

Steve Lyon circulated an analysis of customer comments made for each of the leisure facilities for the period January 2016 - January 2017, which monitored the trend in the quantity and type of comment received. The analysis forms part of the contract monitoring process.

Customer Comments

Steve Lyon also circulated a copy of the detailed customer comments for the months of December 2016 and January 2017. The format included the response or action taken, under categorised headings of maintenance, health and safety, cleaning and by staff and also where a compliment had been recorded on a centre by centre basis.

December 2016 – He drew attention to the number of compliments received in respect of the Isca Bowls Centre and the Northbrook Pool and a high number of comments relating to the Pyramids Leisure Centre. Responding to a Member's enquiry, Steve Lyon reiterated the difficulty of maintaining the temperature at the Wonford Sports Centre, reminding Members that a modified design had resulted in gaps in the glass of the central walkway through the building.

Councillor Bialyk referred to the positive compliments at the Isca Bowls, which had to be tempered with the comments made in respect of the Pyramids. Councillor Brimble paid tribute to the staff at the Northbrook Pool and a resulting reduction in comments. He welcomed the continuing school use.

January 2017 - Jeremy Wright updated Members on comments on the waiting list for activities. Individuals could be contacted with details of space in a class, but then they did not attend. A decision was taken in February that equal priority should be offered to those on the waiting list and contact be made by an automated email. This was deemed to be a fairer and a more resource efficient way to make contact. He also responded to comments on the cleaning regime at the Riverside Leisure Centre, which employed a full time cleaner along with input from the recreation assistants.

4 **CUSTOMER VISITS ANALYSIS**

Steve Lyon presented more in depth detail of the total customer and facility customer visits for all of the sites from the commencement of the current contract period of 2010/11 until the current year of 2016/17. He reported a steady increase in visits per annum since the commencement of the contract on a site by site basis:-

- Clifton Hill - 46,000 increase pa
- Exeter Arena 9,000 increase pa
- Isca Bowls Centre 11,000 increase pa
- Northbrook Golf - 4,000 decrease pa (attributed in part to flood defence work being undertaken across the site)
- Northbrook swimming pool -12,000 decrease pa (reduction in school groups)
- Pyramids - 13,000 increase pa
- Riverside - 56,000 increase pa
- Wonford Sports Centre - 14,000 decrease pa (loss of outdoor asto-turf pitch)

He added that Exeter Arena had benefitted from a new running track and he also provided more detail about how Northbrook Golf Course had been effected. The level of antisocial behaviour and loss of the astro pitch may also have been a contributory factor to the reduction in patronage at the Wonford Sports Centre, whilst at Northbrook Pool, the loss of schools groups as well as swimming clubs who used the Pyramids Centre had an impact. Councillor Robson suggested that the recent redevelopment of Lidl's may also have had an effect, as well as the increased competition of sports facilities.

Councillor Bialyk enquired about the way in which the data was gathered. Jeremy Wright advised that every effort was made to record the numbers of all those who entered any site facility, but there were occasions when the turnstile was open and patrons used the opportunity to walk through. He was proud of the growth that Legacy Leisure had achieved over this period. Councillor Brimble agreed there had been great progress, but he enquired about the scope to increase the membership further. Steve Lyon referred to the site by site data which provided information for the last six years, and it was possible to see monthly fluctuations and seasonal trends. Although some sites had increased membership, Legacy Leisure were rapidly approaching capacity at some of the facilities. Steve Lyon agreed to continue to report the more detailed statistics based on the facility that each meeting was designated to review.

Councillor Bialyk welcomed the attendance by Councillor Harvey as a Member of the Sports Strategy Task and Finish Group. Councillor Harvey referred to the progress made by that group, and the difficulty of obtaining information from the 'harder to reach' groups who would also use the leisure facilities. It was important that if the capacity was being reached in facilities, and with the challenges of future investment, that further opportunities to use existing facilities in a more imaginative way be explored. Councillor Bialyk referred to future funding bids from Sports England for participation and Exeter City Council's efforts to become involved. Councillor Harvey enquired if it was possible to drill down further into the existing figures to establish the geographical location of patrons. It was noted that it would be possible to extract the data using post code analysis of members if required.

5 **PRESENTATION BY LEGACY LEISURE ON THE SERVICE IMPROVEMENT PLAN FOR THE RIVERSIDE LEISURE CENTRE**

Simeon Lewry, the Manager of the Riverside Leisure Centre provided an update on the Service Improvement Plan work for 2017. Staff had received very positive feedback on the changes. He covered a number of key areas of interest and achievement throughout the year including a refurbishment of the gym with a £28,000 investment including an update of the resistance equipment and redecoration. Other achievements included:-

Other Main Building/Maintenance Improvements

Replacement of the rebound and dividing boards in the sports hall which offered a huge improvement to the safety and appearance of the sports hall

Replacement of the dividing curtain in the sports hall

Activities

- Swimming Lesson participation which had increased to 120
- This Girl Can Squash
- Women's Running Club with regular participants and an external instructor
- Nerf Parties (Non Expanding Recreational Foam) - parties based around soft play.

Major Plans for 2017

- Air Conditioning Installation for MP2 to ensure the environment was more comfortable

- Entrance Gate Reconfiguration with investment in a larger entrance gate to be operated by Reception, to enable larger groups, also easier wheelchair and pram access, and a turn style arrangement for both entrance by swipe card and exit.
- Decoration work of the main atrium

Simeon Lewry responded to a comment from Councillor Bialyk on improved lighting in the soft play area.

NB Subsequent to the meeting and later in the day of the meeting, a fire took place at the Riverside Centre and the Centre would be closed for a period of time. This may also impact on the dates discussed at this meeting in relation to the Councillor's Evening discussed in Minute 2.

6 **DATES OF MEETINGS FOR 2017**

The following dates were confirmed.

4 April 2017 – Visit and improvement Plan Clifton Hill Sports Centre - (Meeting to be held at Isca Centre)

13 June 2017 – Visit and Improvement Plan Exeter Arena – (Meeting to be held at Isca Centre)

12 September 2017 – Visit and Improvement Plan Wonford Sports Centre – (Meeting to be held at Wonford Community Centre)

24 October 2017 – Visit and Improvement Plan Pyramids Swimming Centre – (Meeting to be held at Isca Centre)

12 December 2017 – Visit and Improvement Plan Northbrook Swimming Pool – (Meeting to be held at Isca Centre)

(The meeting commenced at 10.00 am and closed at 11.15 am)

Chair