

**EXETER CITY COUNCIL**

**SCRUTINY COMMITTEE - ECONOMY  
9 SEPTEMBER 2004**

**EXECUTIVE  
14 SEPTEMBER 2004**

**CITY CENTRE AUDIT**

**1. PURPOSE OF REPORT**

- 1.1 To seek Members' comments on plans to undertake a City Centre Audit and on the scope of the proposed City Centre Audit.

**2. BACKGROUND**

- 2.1 Exeter City Centre is operating within an increasingly competitive environment. A start has been made on the redevelopment of Drake Circus in Plymouth and there is anecdotal evidence that Taunton and some of the smaller settlements in Exeter's shopping catchment are proving attractive to shoppers for reasons relating to particular store operators and the general shopping environment.
- 2.2 Against a backdrop of increasing competition, significant progress is now being made in relation to City Centre redevelopment and enhancement, with a comprehensive range of initiatives to which the City and County Council's and private sector partners are committed that will transform the City Centre over the next few years. The centrepiece of the City's strategy is the redevelopment of Princesshay, but works such as the current High Street improvement project are also critical to the attractiveness of the City Centre as a shopping destination. The planned improvements to the Museum and the development of a Cultural Quarter will also widen the attractiveness of Exeter as a destination.
- 2.3 There is some danger in taking anecdotal views of the threats presented by competitor centres as being solid evidence, but equally there are no grounds for being complacent about what Exeter has to offer as a shopping and visitor destination. Whilst significant progress is now being made in relation to City Centre redevelopment and enhancement, it is important that future City Centre strategy is informed by quantitative and qualitative research. The undertaking of a City Centre Audit would provide a key element of the information requirement needed to underpin the development of future City Centre strategy development.
- 2.4 Guidance from Central Government in relation to town and city centres makes it clear that local authorities should closely monitor the performance of their city centres by regularly reviewing a range of data as part of an overall 'health check'.
- 2.5 Work on assessing the health of the City Centre is already being taken, with actions being taken in a number of areas:

- (i) Updates of retail spending, to identify what overall capacity the City needs for convenience and durable goods, are commissioned by the City Council. Government advice is that such spending surveys should be updated every five years. An update on retail spending was commissioned earlier in the year from CBRE (formerly known as Hillier Parker) and the recently received report outcomes will be reported back to Scrutiny Committee later in the Autumn. The intention, in line with commitments given at the Local Plan Inquiry, will be to update this survey again in 2008, once Princesshay has been in operation for a year.
  - (ii) City Centre pedestrian footfall levels are monitored on a quarterly basis, with this work commissioned by the City Council and undertaken by the consultants PMRS.
  - (iii) Retail vacancy levels are monitored by the City Centre Manager.
  - (iv) A programme of monitoring retail turnover levels is currently being re-established by the City Centre Manager.
- 2.6 Although work on assessing the health of the City Centre is being undertaken on an on-going basis in a number of areas, no research is currently being undertaken on the views and behaviour of City Centre users and, perhaps more importantly, on the views and behaviour of potential users who are currently travelling to other towns and cities in the South West.

### **3. PROPOSAL**

- 3.1 A City Centre Audit is now proposed, to provide a health check on city centre facilities and to inform the direction for future city centre strategic planning.
- 3.2 The proposed City Centre Audit will address a number of issues, to include:
- (i) Users' attitudes about what Exeter city centre has to offer.
  - (ii) An assessment of how attitudes about Exeter city centre compare to other local centres such as Taunton, Plymouth and Barnstaple.
  - (iii) An analysis of key city centre performance data, including vacancy rates, footfall, spending, rental values and parking behaviour.
  - (iv) An analysis of which retailers exhibit the largest 'pull' in terms of attracting customers to the city centre, including an analysis of the current offer and of the retail outlets customers would like to see in the future.
  - (v) An analysis of what effect the rise in online shopping is likely to have on the city centre economy and on the retail spending habits of city centre customers.
  - (vi) An analysis of the relationship between commuting patterns for working and shopping.
  - (vii) The importance of other attractions and the evening economy in encouraging people to visit the City Centre.
- 3.3 In assessing users attitudes about what Exeter city centre has to offer, it is planned to use the proposed City Centre Audit to secure specific feedback on:
- (i) What consumers generally like or dislike about the city centre.
  - (ii) Perceptions of different areas of the city centre, to determine how perceptions vary between areas.

- (iii) Cleanliness of the city centre.
- (iv) Graffiti and flyposting – and whether these issues are being satisfactorily addressed.
- (v) Perceptions of personal safety in the city centre.
- (vi) The quality and clarity of city centre signage – both in relation to directional signage in to the city centre and pedestrian signage on arrival.
- (vii) The quality and availability of city centre car parking, to include feedback on the convenience and pricing of city centre car parking and the safety and cleanliness of city centre car parks.
- (viii) Public transport as a means of travelling in to the city centre, to include feedback on the issues of service frequency, fares and quality.
- (ix) The quality of the city centre environment, with specific comments to be sought on the recent programme of city centre street improvement works and, specifically, the recently implemented High Street improvement works.
- (x) Quality and amount of city centre pedestrianised spaces.
- (xi) The ‘mix’ of different uses in the city centre.
- (xii) Special events in the city centre, such as specialist markets, late night shopping, Sunday shopping, Christmas shopping events and festival activities.

3.4 It is important that this work is undertaken by an independent organisation with experience of such audits in other cities. The consultants appointed to undertake the City Centre Audit will be asked to make recommendations on:

- (i) Physical improvements, for example, relating to signing and car parking that could be made to help improve the appeal of the city centre.
- (ii) Steps that could be taken to improve the way in which the city centre is marketed to potential users.
- (iii) How best to engage with and inform people about forthcoming and current developments, promotions and events.
- (iv) How best to develop the evening economy to appeal to a wider age range.
- (v) What measures are needed to improve the overall attractiveness of the City Centre to visitors.
- (vi) How can existing public/private sector partnership working be further improved and strengthened.
- (vii) Future city centre performance monitoring arrangements.

3.5 Results from the City Centre Audit will be used to inform the development of a new city centre strategy document, with city centre strategy development work to be undertaken in early 2005.

#### **4. RESOURCE IMPLICATIONS**

4.1 Based on their experience of advising other authorities, tenders will be invited from:

- (i) CB Richard Ellis.
- (ii) Donaldsons.
- (iii) RPS Group.

- 4.2 The selected consultants will be appointed on the basis of having been assessed on a combination of criteria, to include price, relevance of tender to project brief and experience of delivering similar projects.
- 4.3 Once an organisation has been appointed to undertake the City Centre Audit, it is anticipated that the project will take three months to complete.
- 4.4 The total cost of this work is likely to be in the range £20-25,000. Land Securities have agreed to contribute £10,000 to this and the remainder would be funded through the Economic Development Reserve.
- 4.5 Project management will be undertaken by the City Centre Manager.

**5. RECOMMENDED that**

- (1) Members comment on the scope for the proposed City Centre Audit.
- (2) Scrutiny supports and Executive approves the carrying out of a City Centre Audit.

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**Local Government (Access to Information) Act 1985 (as amended)**  
**Background papers used in compiling this report – none**