



## Exeter City Council

To the Chair and Members  
of the Scrutiny Committee - Economy

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### **AGENDA FOR EXETER CITY COUNCIL SCRUTINY COMMITTEE - ECONOMY**

The Scrutiny Committee - Economy will meet on **THURSDAY 12 MARCH 2009**, commencing at **5.30 pm**, in the Rennes Room, Civic Centre, Paris Street, Exeter to consider the following business. If you have an enquiry regarding any items on this agenda, please contact Sharon Sissons, Member Services Officer on **Exeter 265115**.

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

Pages

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

1

#### **MINUTES**

To sign the minutes of the meeting held on 22 January 2009.

2

#### **DECLARATIONS OF INTEREST**

Councillors are reminded of the need to declare personal and prejudicial interests, including the nature and extent of such interests, in relation to business on the agenda, before any discussion takes place on the item. Councillors requiring clarification should seek the advice of the Monitoring Officer prior to the day of the meeting.

3

#### **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 any of the items on the 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 for the consideration 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, Schedule 12A of the Act.

4 **QUESTIONS FROM THE PUBLIC UNDER STANDING ORDER 19**

A period of up to 15 minutes should be set aside to deal with questions to the Committee from members of the public.

Details of questions should be notified to the Assistant Chief Executive at least three working days prior to the meeting. Further information and a copy of the procedure are available from Member Services (Exeter 265115) and also on the Council web site <http://www.exeter.gov.uk/scrutinyquestions>

5 **QUESTIONS FROM MEMBERS OF THE COUNCIL UNDER STANDING ORDER 20**

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

**MATTER FOR CONSIDERATION BY SCRUTINY COMMITTEE - ECONOMY**

6 **EXTENDING SUPPORT FOR SMALL BUSINESSES**

To receive the report of the Head of Economy and Tourism – *report circulated* 1 - 6

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

To receive the report of the Head of Economy and Tourism – *report circulated* 7 - 22

8 **UPDATE REPORT ON SERVICE ECONOMIES**

To receive the report of the Director Economy and Development – *report circulated* 23 - 28

9 **ARTS AND MEDIA STRATEGY UPDATE**

To receive the report of the Head of Economy and Tourism – *report circulated* 29 - 30

**PERFORMANCE MONITORING**

10 **ECONOMY STEWARDSHIP TO DECEMBER 2008**

To consider the report of the Head of Treasury Services - *report circulated* 31 - 36

11 **NATIONAL PERFORMANCE INDICATOR RESULTS 2007/2008 - HOW EXETER'S RESULTS COMPARE**

To received the report of the Director Economy and Development – *report circulated* 37 - 38

(Please bring the copy of Performance Indicator Results previously sent to you by the Policy Unit)

12 **REVIEW OF BUSINESS**

To consider the report of the Director Economy and Development – *report circulated* 39 - 40

**DATE OF NEXT MEETING**

The next **Scrutiny Committee - Economy** will be held on Thursday 11 June 2009 5.30 pm

**FUTURE BUSINESS**

The schedule of future business proposed for this Scrutiny Committee and other Committees of the Council can be viewed on the following link to the Council's website: <http://www.exeter.gov.uk/forwardplan>  
Councillors can view a hard copy of the schedule in the Members Room.

**Membership -**

Councillors M A Baldwin (Chair), Gale (Deputy Chair), Boyle, P J Brock, Coates, A Hannaford, Martin, Newcombe, Noble, Sheldon, W M Starling, Wardle and Winterbottom

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## EXETER CITY COUNCIL

### SCRUTINY COMMITTEE – ECONOMY 12 MARCH 2009

#### EXTENDING SUPPORT FOR SMALL BUSINESSES

##### 1. PURPOSE

- 1.1 To inform Members of a proposal to expand the capacity of support in Exeter for small businesses to assist their survival.

##### 2. BACKGROUND

- 2.1 In June 2008, a report was taken to Scrutiny Committee – Economy about the need to support the generation and survival of new businesses as being important to the local economy in order to create new or perhaps better employment opportunities, to replace those who have ceased trading and to enable the economy to respond to changing economic circumstances.
- 2.2 As Members have been advised, Exeter has a lower rate of entrepreneurial activity than other locations. The table in Appendix 1 indicates that Exeter's rate of VAT registered businesses per 10,000 of its working age population is around 37, compared with much higher rates in other areas. It remains important to improve performance on the number of start-ups and their survival, not only to broaden Exeter's economic diversity and be more able to withstand the vagaries of the market, but also to create employment for residents as a way of raising incomes.
- 2.3 Members were briefed on the establishment of Exeter Business Support, a partnership between the City Council, Business Link, University of Exeter and Peninsula Innovations Limited (the Company that operates the Innovation Centre). Exeter Business Support helps viable new businesses to start up in the city as well as helping existing ones to grow and survive.
- 2.4 In 2008, the following number of businesses were supported and advised through the joint activities now being delivered through Exeter Business Support:-
- 307 pre-start businesses
  - 141 start-up businesses
  - 133 existing small businesses
- 2.5 During previous downturns, Exeter has fared better than other areas, due in part to the high proportion of the workforce in the public sector and due to its position as a hub for services for businesses, for retail and for visitors. However, unemployment and business closures during 2008 have been increasing nationally and more recently locally.
- 2.6 Data produced by the Insolvency Service, indicates that in 2008, there were over 15,500 compulsory liquidations and creditors' voluntary liquidations in England and Wales, with a sharp increase in company failures in the last quarter; overall liquidations for 2008 were 24 % higher than 2007. Increases in insolvent businesses and individuals, tend to follow 6 to 12 months after an economic downturn.
- 2.7 As has been widely reported, company insolvencies are likely to increase over the coming months, as too, will resultant job losses. Data from Job Centre Plus for the South West supports this view. For October - December 2008 period, Jobcentre Plus South West was notified of 12,619 redundancies. This is 45% up on the previous quarter. Reported redundancies are also up 381% on the same period in 2007.

- 2.8 In January 2008, over 41,000 people were claiming Job Seekers Allowance (JSA) in the South West Region. In January 2009, this had risen to nearly 77,000 people, an increase of nearly 87%. Exeter saw a percentage rise of around 83%, with an increase from 1,007 to 1,831 people claiming JSA. The table in Appendix 1 provides more detail on the upward trend.
- 2.9 Vacancies advertised in the Exeter Job Centre decreased by 46% from January 2008 to January 2009, down from 837 to 453.
- 2.10 In summary, the recession is affecting the ability of businesses to survive and prosper, job losses are increasing and vacancies are declining. It is important that timely support is provided to help vulnerable small employers, where possible, to safeguard and create jobs.

### **3. EXTENDING SUPPORT**

- 3.1 Working through the partnership with Exeter Business Support, a small number of companies and consultancies that provide specialist advice to small businesses have been approached to explore their interest and views on what is required to support businesses to start up, grow and survive in the city during the difficult economic climate. The emerging consensus is that small businesses struggling to survive need early intervention that guides them on how they might best avoid closure and safeguard jobs. Often a few hours of focussed effort in the right place from professional and specialist advice can make the difference to survival or not.

#### **Proposal**

- 3.2 It is proposed that early access to professional support and guidance for small businesses is offered, using funding from the City Council, together with contributions from small businesses needing advice, support from partners within Exeter Business Support and also through a reduction in fees charged by professional and specialist companies. This would mainly be in 4 core areas:
- Effective marketing
  - Financial management and securing external funding
  - Employment law
  - Achieving efficiencies in operation and expenditure.
- 3.3 It is important to note that traditionally most small businesses do not seek of their own accord such professional and specialist advice, which could make the difference to them surviving and growing. It is anticipated that as they experience the positive effects of tailored specialist advice, this will encourage them to seek further support from professional and specialist advisors. In this respect, Exeter Business Support will also have encouraged an increase in business to business services.
- 3.4 The following has been discussed with partners in Exeter Business Support to encourage and provide for greater take-up of professional and specialist advice:
- 3.4.1 an agreement to undertake proactive promotion of a targeted service to encourage small businesses at risk to take early preventative measures to safeguard their business and their employees
- 3.4.2 Business Link, in addition to managing the enquiries for business support in Exeter through their 'Gateway' call centre and 24 hour access to on-line information, have agreed to deploy as required, additional staff to the two already working in the city, to meet the need for any increased one to one advice in Exeter. Initial assessment of the core issues of each business survival will be assessed to identify the most appropriate means of providing in depth support through this initiative to small businesses that would otherwise not be able to pay by themselves for specialist and professional advice.

3.4.3 As part of this initiative, several specialist and professional firms in Exeter in addition to providing initial free consultation, have agreed in principle to reduce their normal fees by upto 33% for clients identified by Exeter Business Support as being in need of this targeted support

3.4.4 Business Link have also agreed to make follow up contact with clients of Exeter Business Support to measure the impact/outcome of support given through this initiative, namely: what difference the professional advice made to their businesses in terms of jobs safeguarded, jobs created and the financial performance of their business.

3.5 Through Exeter Business Support, businesses wishing to take up this initiative will have to:

- contribute up to £250 of the reduced costs of professional fees, which would be match funded by up to £250 from the City Council – this will enable early intervention on offer through this targeted initiative to reach at least 100 small businesses in Exeter
- sign a commitment to provide information to Business Link that enables the measuring of the impact of the support.

3.6 This initiative will typically secure on average, 8 hours of intensive specialist support per business.

#### **Criteria for the release of City Council funding**

3.7 Based on the assessment of Exeter Businesses Support advisors, funding will be made available if a small business meets one or more of the following criteria: that there -

- is an identifiable risk of job losses
- is a need for help to secure external funding
- are significant opportunities to reduce and/or avoid unnecessary expenditure
- is an identified weakness in marketing effort and capability.

#### **Promoting the initiative**

3.8 Once the procedure for delivering this initiative has been agreed by partners and professional and specialist firms have committed themselves to reduced fee rates, it will be promoted through a range of channels including: -

- partners in Exeter Business Support,
- email alerts,
- a dedicated Exeter Business Support website,
- a range of customer facing City Council Services,
- Job Centre Plus,
- Train to Gain,
- Westward Training and Personnel, which supports staff facing redundancy,
- High street banks and professional services in the city,
- business centres,
- Exeter Chamber of Commerce & Industry,
- Citizens Advice Bureau and,
- local media.

**4 FINANCIAL IMPLICATIONS**

- 4.1 Peninsula Innovations Limited (operator of the University's Innovation Centre) will administer the City Council's 50% matched funding element (of up to £250 per small business supported) and monitor the payment of fees to professional and specialist firms.
- 4.2 It is intended that at least 100 small businesses will receive assistance through this initiative at a cost of £25,000. This funding can be met from within the Economy and Tourism budget's allocation for the Exeter Business Fund, which is no longer required, having been superseded by a regional fund promoted by the South West Regional Development Agency.

**5. RECOMMENDED that**

- 5.1 Members support the proposal to extend the services of Exeter Business Support to help small businesses in Exeter survive and grow.

**RICHARD BALL  
HEAD OF ECONOMY AND TOURISM**

**ECONOMY AND DEVELOPMENT DIRECTORATE**

**Local Government (Access to Information) Act 1985 (as amended)  
Background Papers used in compiling the report: -**

Scrutiny Committee Economy 5 June 2008 'Support for Small Businesses'



## APPENDIX 1

## VAT registrations per 10,000 working age population

Area	Business Registrations 2007	Working-age Population 2007	Rate per 10,000 working-age population
Exeter	305	82,900	36.8
East Devon	395	70,500	56.0
Mid Devon	240	44,500	53.9
Teignbridge	400	72,300	55.3
EHOD*	1,340	270,200	49.6
Devon	3,195	674,700	47.3
South West	17,020	3,111,600	54.7
South East	31,970	5,095,700	62.7
England & Wales	186,720	33,588,500	55.6

Source: VAT Registrations 2007 and Mid Year Population Estimate 2007 @ Crown Copyright. \*EHOD – Exeter and Heart of Devon covering Teignbridge, East Devon, Mid Devon and Exeter.

## Claimant Count: rates and absolute numbers December 2007 to January 2009

Date	Exeter		EHOD		Devon incl Plymouth & Torbay		South West		England & Wales	
	number	rate	number	rate	number	rate	number	rate	number	rate
Dec-07	943	1.2	2,705	1.0	9,528	1.4	37,909	1.2	698,523	2.1
Jan-08	1,007	1.2	2,910	1.1	10,354	1.6	41,126	1.3	732,020	2.2
Feb-08	1,036	1.3	2,896	1.1	10,685	1.6	42,393	1.4	748,187	2.2
Mar-08	1,011	1.3	2,739	1.0	10,172	1.5	41,412	1.3	743,046	2.2
Apr-08	1,014	1.3	2,659	1.0	9,660	1.4	40,723	1.3	736,789	2.2
May-08	1,017	1.3	2,681	1.0	9,535	1.4	40,729	1.3	734,806	2.2
Jun-08	1,063	1.3	2,647	1.0	9,583	1.4	40,964	1.3	736,136	2.2
Jul-08	1,138	1.4	2,975	1.1	10,442	1.6	43,610	1.4	765,992	2.3
Aug-08	1,327	1.6	3,421	1.3	11,646	1.7	48,017	1.6	812,253	2.4
Sep-08	1,315	1.6	3,443	1.3	11,762	1.8	49,241	1.6	833,688	2.5
Oct-08	1,426	1.7	3,801	1.4	12,746	1.9	52,180	1.7	856,480	2.5
Nov-08	1,565	1.9	4,384	1.6	14,283	2.1	59,490	1.9	931,993	2.8
Dec-08	1,663	2.0	4,974	1.8	16,135	2.4	66,710	2.1	1,019,789	3.0
Jan -09	1,831	2.2	5,585	2.1	18,158	2.7	76,814	2.5	1,134,158	3.4

Source: Claimant Count @ NOMIS Crown Copyright

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## EXETER CITY COUNCIL

### SCRUTINY COMMITTEE - ECONOMY 12 MARCH 2009

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

##### 1.0 PURPOSE

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

##### 2.0 BACKGROUND

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

##### 3.0 PROGRESS TO DATE

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

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

Outcomes and progress to date:

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

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

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

Outcomes and progress to date:

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

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

Outcomes and progress to date:

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

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

Outcomes and progress to date:

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

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

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

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

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

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

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

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

## 5.0 CURRENT ECONOMIC CLIMATE

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

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

## 6.0 PERFORMANCE MONITORING

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

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

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

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

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

6.6 The main comparisons from 2005 to 2007 include:

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

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

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

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

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

Source: Cambridge Economic Impact Model

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

## 7.0 PRIORITIES FOR 2009 - 10

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

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



- Overseas market

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

## 8.0 FINANCIAL IMPLICATIONS

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

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

## 9.0 RECOMMENDED that:

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

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

### **ECONOMY AND DEVELOPMENT DIRECTORATE**

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

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

1. Scrutiny Committee - Economy 18 January 2007

## APPENDIX 1

## EXETER VISITOR/TOURISM STRATEGY - ACTION PLAN PROGRESS

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

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

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

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

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

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

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

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

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

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

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

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



## APPENDIX 2

## Tourism Performance Indicators

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

## APPENDIX 3

## Cambridge Economic Impact Model

## Economic impact of tourism within Exeter

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

Source: South West Tourism

## EXETER CITY COUNCIL

### SCRUTINY ECONOMY COMMITTEE 12 MARCH 2009

#### UPDATE REPORT ON SERVICE ECONOMIES

##### 1.0 PURPOSE OF REPORT

- 1.1 This report advises Members of progress on the identification and implementation of service economies for the Scrutiny Economy budget.

##### 2.0 INFORMATION

- 2.1 Members received a report on a range of service economies at their meeting on 13 November, as a result of which various economies were agreed for implementation. In the November report, reference was made to the need to make significant economies in the operation of the Archaeological Field Unit and a report was promised for the 22 January Scrutiny Economy meeting. That meeting discussed, and Executive on 27 January approved, a revised structure (see Appendix 1) for the Archaeological Field Unit and that structure is now in the process of being implemented. A new Head of Unit has been appointed and by the time of this meeting, the senior and middle elements of that structure should have been recruited to. The intention is to complete all the re-structuring by the end of March for the formal implementation of the new structure on 6 April. To date, a number of staff have been offered the opportunity to apply for other vacancies within the Council, but the eventual scale of the necessary redundancies will not be known until the end of the process.
- 2.2 Since consideration of this item, further economies have been identified and approved by Executive on 10 February. These total some £269,600 in 2009/10 with a further £42,000 identified for 2010/11. The agreed service reductions are shown in Appendix 2 to this report. It should be emphasised that all of the savings in Appendix 2 have been discussed by Members and approved by Council on 24 February as part of the budget setting process.

##### 3.0 RECOMMENDATION

Members are asked to note the contents of this report.

**JOHN RIGBY**  
**DIRECTOR ECONOMY AND DEVELOPMENT**

**ECONOMY & DEVELOPMENT DIRECTORATE**

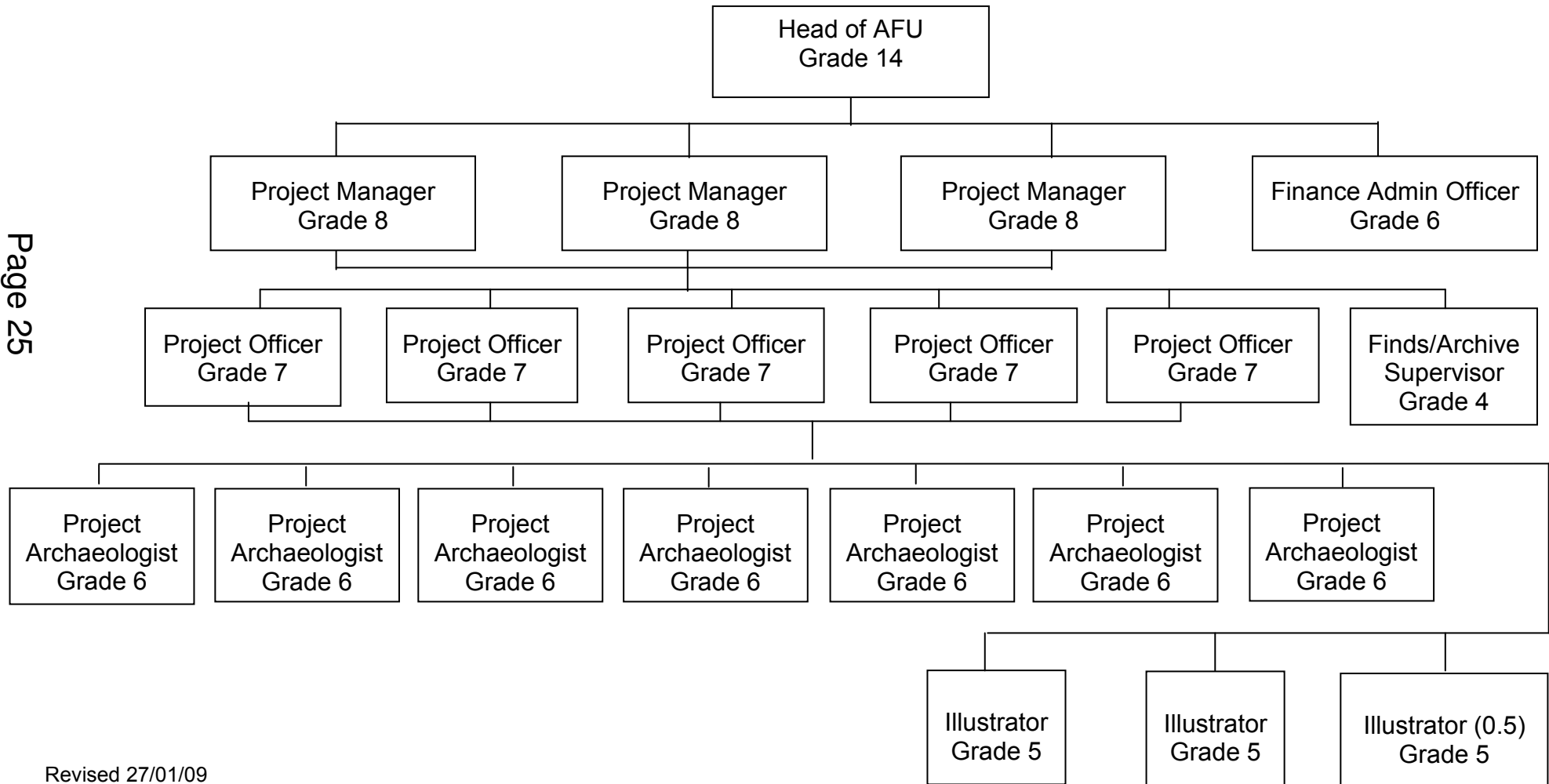
Local Government (Access to Information) Act 1972 (as amended)

*Background papers used in compiling this report:-*

None.

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**EXETER CITY COUNCIL  
ECONOMY & DEVELOPMENT DIRECTORATE  
APPROVED STRUCTURE FOR ARCHAEOLOGICAL FIELD UNIT**



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## APPROVED REVENUE BUDGET SAVINGS

	2009/10 £	2010/11 £
<b>GENERAL</b>		
Reduce budgeted provision for pay award from 2.5% to 1.5%	225,000	
AIM – Reduced Expenditure	155,000	
<b>Total General</b>	<b>380,000</b>	
<b>ECONOMY AND DEVELOPMENT</b>		
Estates		
– Staffing	7,500	2,500
– Lease Repairs Budget	30,000	
Economic Development		
– Arts Development Officer	28,300	
– Web/Marketing	12,500	
– Further reduction in Festivals Budget		16,000
– Shakespeare in the Gardens – remove grant funding	10,000	
– Delete proposed new bid re Christmas Lights switch on	10,000	
Parking, Engineering and Business Support		
– Staffing		23,500
– Additional income from Devon PCT enforcement contract	10,000	
– Additional income from advertising contract in car parks	7,500	
– Reduce Car Parking overtime	15,000	
– Structural Repairs/Operational essentials – for car parks	20,000	
Planning and Building Control		
– Staff saving in Design	15,700	
– Staff savings in Development Control	27,400	
– Reduced advertising for Public Notices	15,000	
– Training Budget	10,000	
City Centre Management		
– Terminate Police Community Support Officers contract	50,700	
<b>Total Economy and Development</b>	<b>269,600</b>	<b>42,000</b>





## EXETER CITY COUNCIL

### SCRUTINY ECONOMY COMMITTEE 12 MARCH 2009

#### ARTS & MEDIA STRATEGY UPDATE

##### 1.0 PURPOSE OF REPORT

- 1.1 To update Members on the progress of the Arts and Media Strategy.

##### 2.0 BACKGROUND

- 2.1 At the meeting of the Scrutiny Committee – Economy held on 22 January, Members requested that the Arts and Media Working Group be reconvened to look at the festivals budget, to explore other options to avoid a proposal for the alternation of the Summer Festival and Animated Exeter. This report is based on the minutes from a meeting of the Working Group held on 6 February.

- 2.2 A paper was circulated outlining the predicted expenditure for the festivals portfolio for 2009/10, which gave the background and offered a suggested approach for each festival. Comments made at Scrutiny Committee were noted including the need to maintain a year round portfolio of festivals, but the funding constraints of the next financial year had to be acknowledged.

- 2.3 The festival team was currently working towards a budget of £151,000, and the proposal set out the recommended revenue budget of each festival for 2009/10 –

Summer Festival	£100,000
Exeter Autumn Festival	£15,000
Respect	£2,000
Animated Exeter	£20,000
Vibraphonic	£14,000

- 2.4 It was also noted that it was still not clear what additional pressures there may be on the budget in the coming financial year, not least because of the outcome of the future of the City Council from the current Local Government Review. However it was important to make some strategic changes as to how the festival portfolio will run for the short term future.

- 2.5 The proposals sought to suggest a solution to keep the current level of festivals where possible.

- 2.6 One such solution would be to consider the future funding arrangement for Animated Exeter. Following a recent meeting of other regional funders such as the Arts Council, Screen South West and Exeter partners such as Spacex Gallery and Exeter Phoenix consideration was given to the possibility of managing the festival externally through a not for profit company. There were a number of advantages including greater opportunities to develop and apply for additional funding that may not be available to a local authority; regional funders had indicated that they would be prepared to consider match funding any funds provided by Exeter City Council should the festival become an independently run event. It was noted that Animated Exeter had reached its 10<sup>th</sup> anniversary and this might be a good stage to make some changes, but it would still be identified and associated with the City Council.

- 2.7 Members expressed that perhaps there was a need to change the image of the Summer Festival . The Summer Festival did start as a community event 30 years ago but has developed as ticket sales and sponsorship improved into a more significant event. There was now the opportunity backed up by the Draft Arts and Media Strategy to develop new ways to deliver a high quality and innovative programme. It was suggested the timing of the event could be changed, particularly as the current dates precluded the student population. Such a change might mean less competition with other festivals and perhaps early September might be a possibility for the future. The Summer Festival had already made some changes to delivery in 2009 with the festival team coordinating the classical and outdoor events but events in the core programme being subsidised and programmed directly by the city's key venues with the box sales for the event going to the venue.
- 2.8 There would be more involvement in 2009 by Exeter City Council with the Respect Festival with the development of a partnership between Exeter Respect Committee and the City Council's Festival and Events and Play development teams to produce the Exeter Respect in the Park event on 11 July in Belmont Park. This partnership and new way of working is also supported by DREC.
- 2.9 It was proposed that there be a reduction in the grant programmes and marketing budgets for the Autumn Festival . It is proposed that the Autumn Festival will stay as a separate festival in 2009, but there could be the potential for a further change from 2010 to merge with and extend the period of the Summer Festival in an attempt to make the best use of resources. It was suggested that this might take on the character of the Edinburgh Festival with the Fringe element. Reference was made to the example of the North Devon Festival which also had a month long mix of community based and core events.
- 2.10 In 2009 Vibraphonic funding would be reduced by £2000 but it was recommended that Vibraphonic should try to ensure match funding from commercial or other funding sources as a condition of future service agreements. Also if the Exeter Phoenix are to become more involved in the production of Animated Exeter they may wish to consider the timings of both events.
- 2.11 It was agreed that if the proposals were pursued both the Festival Advisory Group and the Friends of the Festival would be consulted over the Summer and Autumn Festivals. Equally the Animated Exeter working group would be involved. Although any changes in the festivals have been driven by financial constraints, this has provided an opportunity to revisit the way in which they are organised and develop the expertise of those partners with a particular artistic slant and expertise.

### **3.0 RECOMMENDATION**

That Members note the report.

**RICHARD BALL**  
**HEAD OF ECONOMY & TOURISM**

**ECONOMY & DEVELOPMENT DIRECTORATE**

## EXETER CITY COUNCIL

### SCRUTINY COMMITTEE - ECONOMY 12 MARCH 2009

#### ECONOMY SCRUTINY STEWARDSHIP TO DECEMBER 2008

#### 1. PURPOSE OF REPORT

1.1 This report advises Members of any forecast variations to the budget in financial year 2008/09.

#### 2. INFORMATION

2.1 This report highlights any differences by management unit to the outturn forecast for the year compared with the approved annual budget, as at the end of December 2008.

2.2 The total of the variances indicate that the overall net expenditure for this committee will increase by £1,472,870 which represents a variation of 73.6% from the approved budget. This compares with a variance of £1,708,740 reported to the November meeting and is thus a slight improvement. The main variations are detailed in para 2.3 below, however the dominant features of this increase are:

- £1,000,000 projected deficit related to the national concessionary fares scheme.
- £397,000 projected shortfall in car parking income (including fees, season tickets and parking fines).
- £190,000 one-off capital charges related to the revaluation of various car park assets and the Matford Centre.
- £110,000 shortfall in fee income for Planning.
- £160,000 projected deficit for the Archaeological Field Unit.
- £160,000 saving in respect of Asset Improvement and Maintenance (AIM)

2.3 The projected variances by management unit are shown in the Appendix and explained as follows:

	<b>£</b>
<b>2008-2009 APPROVED ESTIMATE</b>	<b>2,002,270</b>
<b>83A1 PROPERTY &amp; ESTATES SERVICES</b>	<b>(94,430)</b>
<p>The main forecast area of reduced expenditure in this unit relates to staff vacancy savings and other reduced operating costs for the service. There is a saving of £11,000 in respect of Asset Improvement and Maintenance (AIM)</p>	

As previously reported, rental income is higher than expected at several properties due to the completion of various lease renewals, geared rent increases and income from the release of several restrictive covenants relating to ex-council dwellings. Projected income at St George's Retail Units remains lower than budgeted due to the former Card Shop unit being vacant.

<b>83A2</b>	<b>TRANSPORTATION/CONCESSIONARY FARES</b> Information received from Stagecoach and other smaller bus operators, relating to the usage of concessionary bus travel during the period April to September 2008, indicates that the new nationwide scheme for concessionary travel has resulted in a significant increase in costs for Exeter City Council.	1,000,000
	<p>On this basis, early assessment of the impact of the national scheme gives a projected increase in costs to the Council of some £1.947m in 2008/09. The Council has received a specific government grant of £0.647m this year for the scheme, leaving a projected net deficit of £1m, after allowance is made for the contingency provision of £0.3m.</p>	
<b>83A3</b>	<b>CAR PARKING</b> Car park fee income levels are projected to fall below budgeted expectations due to the deteriorating economic climate, competition from the new Princesshay car park and the impact of concessionary travel. Additionally, parking fines income is projected to fall below budgeted levels for the year, continuing a trend which has been observed for the last two years.	372,350
	<p>Overall, income is currently projected to be down by some £397,000 (including fees, season tickets, and parking fines). This is a slight improvement from the November report.</p> <p>In addition, capital charge expenditure is projected to exceed budget by a total of £121,000, which includes a one-off £100,000 charge related to revaluation downwards of various car park land and property.</p> <p>There is a reduction of £150,000 in respect of Asset Improvement and Maintenance (AIM) of which £50,000 is scheme savings and £100,000 will be carried forward to 2009/10.</p>	
<b>83A5</b>	<b>FESTIVALS &amp; EVENTS</b> The Summer Festival has made a small deficit.	10,000
<b>83A8</b>	<b>DISTRICT HIGHWAYS AND FOOTPATHS</b> There is a small saving in respect of contractor payments for maintenance work.	(2,000)
<b>83A9</b>	<b>BUILDING CONTROL</b> Due to the significant recent contraction in the construction industry, building control fee income is estimated to fall below budget expectations. The impact of this is partially offset by reduced staffing costs. The deficit of £31,950 can comfortably be funded from the Building Control earmarked reserve this year.	31,950
<b>83B1</b>	<b>LAND DRAINAGE</b> Income received for sewer adoption work.	(2,200)

<b>83B2</b>	<b>ADMINISTRATION SERVICE</b>	(21,000)
	Savings are projected due to staff vacancies and reduction in expenditure on furniture and equipment.	
<b>83B3</b>	<b>DIRECTOR ECONOMY &amp; TOURISM</b>	(13,140)
	Savings are projected due to a staff vacancy.	
<b>83B4</b>	<b>ENGINEERING &amp; CONSTRUCTION SERVICES</b>	(14,040)
	Savings are projected due to a staff vacancy.	
<b>83B5</b>	<b>PLANNING</b>	21,590
	As previously reported, planning fee income is projected to fall but by a larger sum than previously forecast – £110,000 below budgeted levels by the end of the year due to the general downturn in development activity. This is largely offset by projected staff vacancy savings this year. Additionally, LDF forecast expenditure has been reduced by £43,000 to reflect actual spend and to match the funding brought forward in the associated earmarked reserve.	
<b>83B6</b>	<b>CONSERVATION</b>	(14,000)
	There are savings of £14,000 in respect of two Asset Improvement and Maintenance schemes at St Edmunds Church and St Loyes Chapel.	
<b>83B7</b>	<b>ARCHAEOLOGICAL FIELD UNIT</b>	160,000
	The overall income levels for the Field Unit are projected to be down for the year mainly due to falling demand within the construction industry, together with the cost of non-chargeable time during the move to new premises.	
<b>83B9</b>	<b>MARKETS &amp; HALLS</b>	37,790
	Income levels continue to be above budget for the Matford Centre, Markets and the Corn Exchange. This is offset partly by related cost of sales, AIM and other running costs, resulting in a forecast 'operating surplus' of approx. £52,000.	

However, there is an overall increase in net expenditure this year due to a one-off capital charge of £90,000, related to a revaluation downwards of the Matford Centre asset (assessed as part of the revaluation of the Council's property portfolio this year).

### **2008-2009 EXPECTED FINAL OUTTURN**

**£3,475,140**

3. **RECOMMENDED** that Members note the contents of this report.

HEAD OF TREASURY SERVICES

CORPORATE SERVICES DIRECTORATE

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

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# APPENDIX

## SCRUTINY COMMITTEE - ECONOMY STEWARDSHIP

APRIL TO DECEMBER 2008

ANNUAL BUDGET	SUPPLEMENTARY BUDGET	REVISED BUDGET	CODE		CURRENT OUTTURN FORECAST	FORECAST VARIANCE
£	£	£			£	£
(2,528,810)	62,310	(2,466,500)	83A1	PROPERTY & ESTATES SERVICES	(2,560,930)	(94,430)
1,690,500	0	1,690,500	83A2	TRANSPORTATION/CONCESSIONARY FARES	2,690,500	1,000,000
(3,250,130)	183,320	(3,066,810)	83A3	CAR PARKING	(2,694,460)	372,350
1,776,490	80,000	1,856,490	83A4	ECONOMIC DEVELOPMENT	1,856,490	0
408,660	12,000	420,660	83A5	FESTIVALS & EVENTS	430,660	10,000
588,690	4,000	592,690	83A6	TOURIST INFORMATION	592,690	0
29,000	0	29,000	83A7	ARCHAEOLOGY IN EXETER	29,000	0
978,610	0	978,610	83A8	DISTRICT HIGHWAYS & FOOTPATHS	976,610	(2,000)
59,860	0	59,860	83A9	BUILDING CONTROL	91,810	31,950
121,500	0	121,500	83B1	LAND DRAINAGE	119,300	(2,200)
0	0	0	83B2	ADMINISTRATION SERVICE	(21,000)	(21,000)
0	0	0	83B3	DIRECTOR ECONOMY & DEVELOPMENT	(13,140)	(13,140)
0	0	0	83B4	ENGINEERING & CONSTRUCTION SERVICES	(14,040)	(14,040)
1,327,270	0	1,327,270	83B5	PLANNING SERVICES	1,348,860	21,590
111,400	93,840	205,240	83B6	CONSERVATION	191,240	(14,000)
0	0	0	83B7	ARCHAEOLOGICAL FIELD UNIT	160,000	160,000
55,000	0	55,000	83B8	MAJOR PROJECTS	55,000	0
175,780	22,980	198,760	83B9	MARKETS & HALLS	236,550	37,790
<u>1,543,820</u>	<u>458,450</u>	<u>2,002,270</u>		NET EXPENDITURE	<u>3,475,140</u>	<u>1,472,870</u>
				Transfers from Earmarked Reserves		
			83A2	Contribution to TravelSmart	(5,000)	
			83A9	Building Control	(31,950)	
			83B5	Local Development Framework	(116,050)	
			83B5	Planning Delivery Grant	(176,840)	
			83B8	Major Projects	(55,000)	
				OVERALL FORECAST EXPENDITURE FOR THE YEAR AFTER MOVEMENTS TO/FROM RESERVES	<u>3,090,300</u>	

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## EXETER CITY COUNCIL

### SCRUTINY COMMITTEE - ECONOMY 12 MARCH 2008

#### NATIONAL PERFORMANCE INDICATOR RESULTS 2007/2008 HOW EXETER'S RESULTS COMPARE

##### 1.0 PURPOSE OF REPORT

- 1.1 A full analysis of Exeter's performance indicator results for 2007/08 has been sent to Members under a separate cover. This report provides an overview of the performance of those services covered by this committee. The other two Scrutiny Committees will receive a similar report covering services within their remit.

##### 2.0 BACKGROUND

- 2.1 Exeter's performance indicator results for 2007/08 were published in the Corporate Plan. The Audit Commission subsequently published audited comparative data in December 2008.
- 2.2 The graphs contained within the detailed analysis compare Exeter's results against authorities in the Council's benchmarking group and therefore provide a comparison against other broadly similar councils. (Audit Commission family grouping)
- 2.3 The graphs have been arranged in ascending order. Exeter's results are highlighted on each.
- 2.4 Results for BVPI 78a (Average time to process new benefit claims) and BVPI 78b (Average time taken to process change in circumstances) are still being verified by the Audit Commission and as a result, have not yet been published.
- 2.5 The Audit Commission uses national upper and lower quartile figures as benchmarks against which to judge service performance. The detailed analysis also shows quartile figures for all English district councils against each graph. Services should generally be aiming to be in the top quartile (i.e. the best performing 25% of councils in the country).

##### 3.0 RESULTS OVERVIEW

- 3.1 Exeter is in the top quartile for 19 indicators out of a total of 59 where comparisons are possible (32%), compared to 20 out of 65 (30%) last year. It is in the bottom quartile for 10 indicators, compared with 9 last year.
- 3.2 This year has seen improvement in 25 indicators with 6 of these achieving a higher quartile rating than last year. However, 25 indicators show a lower performance than last year, with 12 achieving a lower quartile rating than last year.
- 3.3 Out of the 7 comparable indicators that fall within the remit of this Scrutiny Committee, 4 have poorer performance. These are BVPIs 106, 109a, 109b and 109c (see below).

## Planning

- 3.4 The percentage of new homes built on brown field sites (BVPI 106) fell from 80.42% in 2006/07 to 68.6% in 2007/08. As a result, Exeter has dropped from the second to the third quartile. However, performance is affected by the context of the planning strategy for the area, in particular, the availability of brownfield sites. In Exeter, many brownfield sites have been re-developed over the last decade. The Council has recently relied on the development of the large greenfield site at Clyst Heath to meet much of its requirements. Some authorities are achieving 100% on this indicator, including Eastbourne, Ipswich, Oxford, Worcester and Worthing within our benchmarking group.
- 3.5 The percentage of major planning applications determined within 13 weeks (BVPI 109b) has dropped from 75% in 2006/07 to 68.57% in 2007/08 causing Exeter to fall from the second to third quartile. Exeter is ninth from the top in its benchmarking group with Cheltenham and Ipswich at the top with 94.44% and 92.31% respectively. The number of major applications is relatively small. The need for section 106 agreements significantly impacts upon performance. Following a more recent drop in performance, new procedures have been put in place to improve the handling of major applications.
- 3.6 The Council processed 74.16% of minor applications in 8 weeks (BVPI 109b), compared with 76.71% in 2005/06. Exeter has remained in the third quartile. Exeter is tenth in the benchmarking group for this indicator. The best performing council in the group was Ipswich with 90.07%. Some authorities achieve higher performance by refusing to negotiate amendments to planning applications, requiring applicants to make fresh applications. This is at the expense of customer satisfaction.
- 3.7 The percentage of other applications processed within 8 weeks (BVPI 109c) has dropped from 84.50% in 2006/07 to 80.4% in 2007/08. This places Exeter second from bottom in its benchmarking group and maintains its position in the bottom quartile.
- 3.8 Significant improvements have been achieved in two areas. 85% of the Council's conservation areas now have an up to date character appraisal (BVPI 219b), compared to 70.6% in 2006/07. This places Exeter in the top quartile. The percentage of appeals allowed against the authority's decision to refuse planning applications (BVPI 204) has dropped from 32.1% in 2006/07 to 30.7% in 2007/08, resulting in a jump from the third to the second quartile.

## 4.0 RECOMMENDED

(1) That Members consider the report and indicate whether they wish to receive any further information on any particular issue(s).

**JOHN RIGBY**  
**DIRECTOR ECONOMY AND DEVELOPMENT**

**ECONOMY AND DEVELOPMENT DIRECTORATE**

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

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

National Performance Indicator Results - December 2008

**Summary- Exeter trend analysis: 2007-2008 Performance Indicator results compared to 2006-2007**

**Key:**

④③②①	National Top District Quartile (Best)
④③②①	National Second District Quartile
④③②①	National Third District Quartile
④③②①	National Bottom District Quartile (Worst)
↑	BVPI for 2007-2008 is in a higher quartile than 2006-2007
→	BVPI for 2007-2008 is in the same quartile as 2006-2007
↓	BVPI for 2007-2008 is in a lower quartile than 2006-2007
N/a	Not Available

Please contact Lorraine Betts in the Policy Unit for further information 01392 265257

BVPI Indicator	Quartile Movement	2006-2007		2007-2008	
		Result	National District Quartile	Result	National District Quartile
<b>PLANNING</b>					
<b>BVPI 106-</b> Percentage of new homes built on previously developed land	↓	80.42%	④③②①	68.6%	④③②①
<b>BVPI 109a-</b> Percentage of major planning applications determined within 13 weeks	↓	75.00%	④③②①	68.57%	④③②①
<b>BVPI 109b-</b> Percentage of minor planning applications determined within 8 weeks	→	76.71%	④③②①	74.16%	④③②①
<b>BVPI 109c-</b> Percentage of other planning applications processed within 8 weeks	→	84.50%	④③②①	80.4%	④③②①
<b>BVPI 204-</b> Percentage of appeals allowed against the authority's decision to refuse planning applications	↑	32.1%	④③②①	30.7%	④③②①
<b>BVPI 205-</b> Quality of Service checklist	→	94.5%	④③②①	94.4	④③②①
<b>BVPI 219a-</b> Total number of conservation areas in the local authority area	N/a	17	N/a	BVPI Deleted	
<b>BVPI 219b-</b> Percentage of conservation areas in the local authority with an up to date character appraisal	→	70.6%	④③②①	85%	④③②①
<b>BVPI 219c-</b> Percentage of conservation areas with published management proposals	→	59.00%	④③②①	Not reported	

## EXETER CITY COUNCIL

### SCRUTINY COMMITTEE - ECONOMY 12 March 2009

#### REVIEW OF BUSINESS

##### 1.0 INFORMATION

- 1.1 Following discussion with the Chair and Vice Chair, the proposed structure of business for the next year is set out below.

##### **June**

Economic Update and City Centre Performance  
Portfolio Holders' Programme for the year  
Key Performance Indicators – year end  
Financial Stewardship – Final report  
Capital Programme Monitoring – year end

##### **September**

Arts Strategy: Action Plan Review  
Transportation Issues  
Financial Stewardship to end June

##### **November**

Festivals Annual Review  
Key Performance Indicators – half year  
Portfolio Holders' Half year Report  
Financial Stewardship to end September  
Capital Programme Monitoring – half year

##### **January**

Archaeology - Annual Report  
Estimates

##### **March**

Tourism Strategy: 2010 – 2013  
Financial Stewardship to end December

##### 2.0 RECOMMENDATION

- 2.1 Members are asked to comment on the above.

**JOHN RIGBY**  
**DIRECTOR ECONOMY AND DEVELOPMENT**

#### ECONOMY & DEVELOPMENT DIRECTORATE

Local Government (Access to Information) Act 1985 (as amended)  
Background papers used in compiling the report:  
None.

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