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AGENDA FOR EXETER CITY COUNCIL SCRUTINY COMMITTEE - ECONOMY

The Scrutiny Committee - Economy will meet on **THURSDAY 8 SEPTEMBER 2011**, 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 8 June 2011.

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**

RESOLVED that, under Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting during consideration of item 14 on the grounds that it involves the likely disclosure of exempt information as defined in paragraph 3 of Part I, Schedule 12A of the Act.

4 **QUESTIONS FROM MEMBERS OF 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 the 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.

MATTERS FOR CONSIDERATION BY SCRUTINY COMMITTEE - ECONOMY

6 **EON ENERGY PARTNERSHIP**

To receive a presentation from Mr Steve Marsh, Strategic Partnership Manager (Sustainable Energy) for E.ON Energy Solutions Limited who will provide an update on the work of the E.ON Energy Partnership. 1 - 8

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

7 **PRESENTATION - LOCAL ENTERPRISE PARTNERSHIP**

To receive a presentation by Dr Stephen Bird, Board Member of the Heart of the South West Local Enterprise Partnership. Dr Bird is South West Water's Operations Director. He is responsible for all aspects of operations and maintenance for the Company, as well as its scientific services and Asset Management.

MATTER FOR CONSIDERATION BY EXECUTIVE

8 **EXETER VISITOR STRATEGY 2012-15**

To consider the report of the Head of Economy and Tourism – *report circulated* 9 - 56

MATTERS FOR CONSIDERATION BY SCRUTINY ECONOMY

PERFORMANCE MONITORING

PART II: ITEM SUGGESTED FOR DISCUSSION WITH THE PRESS AND PUBLIC EXCLUDED

DATE OF NEXT MEETING

The next **Scrutiny Committee - Economy** will be held on Thursday 10 November 2011 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 Cole (Chair), Prowse (Deputy Chair), Bialyk, Choules, Crow, Dawson, A Hannaford, Morris, Payne, Robson, Ruffle, Thompson and Wardle

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 Member Services Officer on (01392) 265115 for further information.

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EXETER CITY COUNCIL

**SCRUTINY COMMITTEE – ECONOMY
8 SEPTEMBER 2011**

EON ENERGY PARTNERSHIP

1.0 PURPOSE OF REPORT

1.1 To update the committee on the work of the Eon Energy Partnership.

2.0 BACKGROUND

2.1 A report introducing the concept of a strategic energy partnership with Eon was presented to the Scrutiny Economy Committee on the 11 November 2010 and the Executive on the 23 November 2010. Given the pivotal role that local government has in achieving sustainable development and mitigating and adapting to climate change, the scale of the challenge and the financial pressures that the public sector is under, it was agreed that it would be necessary, more than ever, to partner with the private sector. Eon presented the council with a proposal to form an energy partnership, putting forward their skills, experience and considerable technical expertise, combined with a track record of working collaboratively and in partnership to deliver agreed objectives.

2.2 Given the considerable benefits of this opportunity to work in partnership with Eon, it was agreed that the Council enter into an energy partnership with Eon and East Devon District Council. It was also agreed that the Exeter and East Devon Steering Board function as the governance structure for assessing performance and managing the partnership with the Projects Director for the New Growth Point acting as the principal lead. In addition it was agreed to seek engagement from Devon County Council in taking forward the programme.

2.3 An Energy Partnership Charter was tabled at the meeting, together with tables of potential projects across the housing, business, transport, community/education and public sector buildings sectors, divided into short, medium and long term projects and the initial work of the emerging partnership has been based on this format.

3.0 PROGRESS TO DATE

3.1 Following the agreement of Exeter City Council and East Devon District Council to enter into an Energy Partnership a Low Carbon Task Force Group (LCTF) has been formed, and now has representatives from Eon, the Exeter and East Devon Growth Point Delivery Team, Exeter City Council, East Devon District Council, Exeter University and Devon County Council Bicton College, Exeter Chamber of commerce, the Met Office and the Royal Devon and Exeter Hospital Trust. Eon have now employed additional resources from the Energy Saving Trust to specifically focus on the work of the task force, and provide additional staff capacity to drive forward projects.

3.2 Since Setting up the LCTF in January this year, the Group has met on a monthly basis. The Group have worked on establishing Terms of Reference and finalising a Memorandum of Understanding which was signed in May this year and officially launched at the Devon County show (copy attached Appendix 1). Eon had an exhibition stand at the Show, in partnership with the Exeter and East Devon Growth Point, highlighting the District Heating Project at Cranbrook, and publicising the potential for energy efficiency, carbon savings and renewable energy within this area.

3.3 The LCTF Group have also been working on developing a spreadsheet of potential projects and pulling together the key stakeholders, partners and resources to move towards delivery. The attached spreadsheet (appendix 2) Key sub groups have also been formed to drive forward the delivery of specific projects, for example, establishing part of a district energy network in the City Centre, in partnership with the University and the RD&E Hospital and out at Monkerton, in partnership with developers and the Met Office. Other projects that the Group have been working on include the development of a solar PV pilot project on 50-75 houses within the city, initiatives around the private rented housing sector, finding ways to deliver improvements to energy efficiency and tackling fuel poverty. On the business side, Exeter Chamber of Commerce have also signed up to the Memorandum of Understanding and are very supportive of developing business opportunities within the green energy sector. On the Community/Education side, the Group have been working in partnership with Bicton College, to look at available opportunities for developing skills and training within the energy sector and the forthcoming opening of the Bicton Earth Centre this autumn will be a significant resource for the area, providing critical training on both the technical and professional side.

3.4 On the funding side, the group will be helping to look at how government incentives such as the Feed in Tariff (FIT) and Renewable Heat Incentive (RHI) where money is paid for the generation of 'green' power and heat, together with penalties such as the Carbon Reduction Commitments (CRC's) where companies will pay a 'green tax' if they fail to reduce carbon emissions to agreed levels, can help to make projects more financially viable. The emerging 'Green Deal' announced by the Government, and due to be operational in 2012, will also help to make funding for renewable energy and energy efficiency measures more accessible and available on more favourable terms. One example of an emerging financial incentive, and a potential source of funding, is what is known as 'Allowable Solutions'. This will come into play where developers are unable to reach 'zero carbon' development (as defined by the Zero Carbon Hub) through building fabric measures and 'on site' measures alone (e.g. solar PV). (New homes will be required to be zero carbon by 2016 and non-domestic development by 2019). If this is the case, developers will be required to make an 'Allowable Solutions' payment (based on £'s per Tonne of Co2, set by the Department of Energy and Climate Change) to make up the difference between the carbon savings they can make on site and the target carbon savings required by the legislation. A key factor here is that this money will go into a central government 'pot' unless local authorities have specific sustainable planning policies in place. This is an area that will need to be explored further in collaboration with the relevant planning policy teams and with technical advisors, to ensure that this potential funding is captured for the local area.

4.0 CONCLUSION

4.1 Good progress has been made to date on some of the short term projects and the Group now needs to continue to push these forward towards delivery on site. We will now also need to develop a strategy for some of the medium and longer term projects including a work programme and policy timetable to help exploit the full potential of the emerging government incentive and evolving energy market. We also need to keep up the pressure on developers to work collaboratively to help deliver these projects, particularly on district heating for example, where it is crucial to get in early in the development process. The philosophy followed to date has been to get some 'quick wins' to kick start the initiative and to get across the wider benefits of having such a partnership and working collaboratively. Longer term, we will need a clear strategy in place, agreed by the partnership and backed up by adopted planning policy and national legislation. We also need to engage with the local residential and business community and obtain a high level of 'buy in' for what we are trying to achieve.

5.0 RECOMMENDATION

(i) That the report be noted.
(ii) That the Council continue to support the Strategic Partnership with Eon and endorse the work of the Low Carbon Task Force.

KARIME HASSAN
DIRECTOR ECONOMY AND DEVELOPMENT

ECONOMY & DEVELOPMENT DIRECTORATE

Local Government (Access to Information) Act 1972 (as amended)
Background papers used in compiling this report:-
Exeter City Council Report to Scrutiny Economy 11 November 2010 & Executive 23 November 2011 and Minutes.

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Low Carbon Task Force

Memorandum of Understanding (MoU)

E.ON, Exeter City Council, East Devon District Council,
Exeter Chamber of Commerce and Devon County Council

Introduction

This Memorandum of Understanding (MoU) sets out the nature of the relationship between E.ON, Exeter City Council, East Devon District Council, Exeter Chamber of Commerce and Devon County Council which all parties have committed to adopting.
The MOU does not create any legal rights obligations between the parties. It is a statement of intent and all parties undertake to work within the spirit of cooperation described here in:

The Rationale

The rationale for this agreement is summarised as follows:
All parties wish to operate in new ways and through a new relationship. All parties firmly believe that their interests are best served by the adoption of cooperative ways of working together. While accepting the need for project specific contracts, all parties accept that this Charter will provide a reference document against which their approach and actions can be compared.

Principal Objectives

The principal objectives of the Task Force are as follows:

1. To reduce energy consumption / carbon footprint / energy costs within the area
2. To increase energy efficiency through smart initiatives / technologies
3. To seek continuous improvement through regular communications and a partnership working programme
4. To deliver additional benefits to the community through education, training, job creation and community engagement
5. To deliver services to the highest standards of quality

The actions that will be taken to deliver the Principal Objectives:

- Co-operation will be continually aspired to in all our activities and communication.
- We agree to work with respect and equality and wherever possible as simplistically as possible
- All parties (and subsequent additional partnership with objective of this MoU will adopt the partnership at a senior level
- All parties will annually allocate the necessary resources where necessary

The Nature of the Relationship

The following values are held by all parties to the MOU:

- No party has a monopoly on best practice, initiative or solution
- All information is shared openly where possible
- Problems are solved jointly
- Innovative proposals are positively criticised
- Working relationships are friendly
- Wherever possible risks are shared

Term

Any party can confirm to the others in writing at any time and with immediate effect that they wish to bring this MOU to an end.

Michael Woodhead
on behalf of
E.ON

Cllr Peter Edwards
on behalf of
Exeter City Council

Cllr Paul Diviani
on behalf of
East Devon District Council

Chris Lorimer
on behalf of
Exeter Chamber of Commerce

Cllr William Mumford
on behalf of
Devon County Council

Signed on: 18 May 2011

e.on | Exeter City Council | East Devon www.eastdevon.gov.uk | Exeter Chamber of Commerce & Industry | Devon County Council

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Brainstorm Project List - Exeter/ East Devon / Devon County

Mar-2011

Partnership	Progress on signature of the partnerhsip MOU- Signed 18/05/11
Partnership	Confirm partnerhsip dates in diaries for the next 6 months
Partnership	Develop a partnership communications strategy -E.ON to instigate
Partnership	Potential for sharing ideas/experience with other cities/areas

Ref	Housing	Business	Transport	Public Sector	Community / Education
1	A solar PV concession pilot project on 50-75 houses, with a view to expand.	Engage with major businesses within the area - maybe a "green" conference with ability to network with local SME	Opportunity to influence the specification for adoptable roads on Cranbrook site - low energy lighting LED's	Opportunity for PV / Microgen on public buildings?	Raise awareness of Energy Experience interactive education programmes
2	Engage with major developers in the growth point area - decentralised energy opportunities - leads in Monkerton and New Court	Grow local SME green economy - through creation of opportunities across sectors. PV good starting point	Engage with County lighting engineers on potential for dimming / trimming / dynamic controls - and funding options	CRC management	How can we increase the uptake in energy efficiency / renewable technologies on school stock?
3	Energy efficiency and micogen opportunities on student housing within Exeter	Develop the opportunity to distribute heat from the new build Marsh Barton EfW plant to local heat users	Engage with major public transport operator to understand their sustainable goals and target - potential for biogas?	Public sector car park / subsidiary lighting	A single port of call web portal site where all information on technology and behaviour changes - SME advertising potential - networking site for local community, stimulate growth - branded
4	Potential link up with BT on fibre network for Cranbrook? Lead in for smart grid - will need engagement with DNO	Engage with new commercial development in Matford which is being built DH ready	Review potential for EV charging point infrastructure both on Cranbrook development and key strategic sites within Exeter City	Paris Street & Heavitree Road district heating network connecting public sector and new development heat loads in City Centre	Leverage in new R&D funding through collaboration on projects with the University of Exeter
5	Tackle fuel poverty in the electrically heated Farm Hill area (Exwick)				Develop an education/apprenticeship partnership with Bicton College Earth Centre.
6	Existing CERT funded Cosy Devon project.				Link with Green Team/Express and Echo

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EXETER CITY COUNCIL

EXECUTIVE
20 SEPTEMBER 2011

SCRUTINY COMMITTEE - ECONOMY
8 SEPTEMBER 2011

EXETER VISITOR STRATEGY 2012 – 2015

1.0 PURPOSE OF THE REPORT

1.1 The purpose of this report is to seek approval for the attached draft Exeter Visitor Strategy 2012 – 2015 to be used for consultation with partners and agencies relevant to its delivery.

2.0 BACKGROUND

2.1 Members received a report on the new Exeter Visitor Strategy 2012 – 2015 at Scrutiny Committee on 10 March 2011. Five priorities were agreed which were to form the basis of the draft Exeter Visitor Strategy 2012 – 2015, to be further developed prior to its issue for formal consultation.

2.2 On the basis of a model used nationally, the 'Cambridge Economic Impact Model', it is estimated that tourism is worth in the region of £159.7 million annually to the local economy. Some 3,766 jobs are supported within hotels, attractions, cultural venues, eating out venues and transport facilities within the city. The table below illustrates the value of tourism to the Exeter economy, as well as the jobs that directly and indirectly relate to tourism.

Economic impact of tourism within Exeter, 2009

Direct actual jobs	2,882
Indirect actual jobs	884
Total actual jobs	3,766
Day visits	1,580,000
Total Day visit spend	£79.5 million
Overnight trips	361,000
Total Overnight trips spend	£71.6 million
Visits to friends & relatives spend	£8.5 million
Other tourism spend	£0.1 million
TOTAL TOURISM SPEND	**£159.7 million**

Source: South West Tourism

2.3 The new Visitor Strategy will build upon the outcomes achieved in the previous Strategy, recognise key changes within the industry, planned capital developments and the need to adjust activities to reflect market trends. The previous Strategy covered the period 2007 – 2010. Even though the Strategy was undertaken amidst the economic downturn, there were a number of significant outcomes and development projects completed. The outcomes of the Strategy were highlighted in the report presented to Scrutiny Committee on 10 March 2011.

2.4 Implementation of the strategy is intended to bring many positive economic benefits to the city in sustaining and creating quality jobs within the tourism industry and increase the profile of Exeter as the regional capital of the South West through private sector investment, as detailed in the Strategy, and public sector investment, in the extension and refurbishment of the Royal Albert Memorial Museum. Actions from the Strategy will continue to raise the profile of the city and the surrounding area regionally and nationally.

3.0 EXETER VISITOR STRATEGY 2012 – 2015

3.1 Tourism has many positive benefits for Exeter. Implementation of the new Strategy is intended to bring positive economic and social benefits to the city in the creation and retention of jobs. It will help support tourism and business investment as well as attracting people to the area. The Strategy is just as concerned about making Exeter a desirable destination for those who live near and in the city.

3.2 Exeter is a key regional cultural, leisure and shopping destination and has the potential to play an even greater role in meeting the needs of visitors to Devon and the West Country. The number and scale of attractions in Exeter has been a limiting factor in attracting additional visitors. The appeal of the city for residents and visitors will be enhanced through the re-opening of the Royal Albert Memorial Museum in December 2011, the opening of John Lewis in 2012, the opening of new hotels (Chapter House Exeter – Magdalen Road 2012, Hampton by Hilton – Exeter Airport 2011), opening of the new Quay Climbing Centre and developments on the University of Exeter Streatham Campus.

3.3 The planned re-opening of the Royal Albert Memorial Museum late 2011, presents Exeter with an exciting and enviable opportunity to gain extensive local, regional and national exposure as a destination investing in its product to attract more day and overnight visitors, groups and conferences to the city.

3.4 Realising the tourism potential of the city goes hand in hand with exploiting visitor opportunities presented within the wider area. The key is to have a concerted effort to minimise duplication and maximise promotion through an integrated approach. The Heart of Devon Tourism Partnership will play an important role in raising the profile of the city regionally and nationally, through the promotion of Exeter to the short break, business tourism and conference market.

3.5 The City Council will continue to work in partnership with tourism businesses as well as Devon County Council, Visit Devon, the local authorities of Teignbridge, Mid Devon and East Devon to implement this strategy. It will also continue to work closely with businesses in the surrounding area and recognise the important role other centres have in providing complimentary cultural, leisure and sporting activities.

3.6 Based on work already undertaken, the following aim has been identified for the Exeter Visitor Strategy 2012 – 2015:

"Further develop the visitor economy in order to create and safe guard employment, through the promotion and development of existing and new visitor facilities, including the Royal Albert Memorial Museum, focusing on the strengths of Exeter as a regional cultural centre. The intention is to increase employment and tourism activity (visitor income) by 5% within the lifetime of the strategy"

3.7 The following five priorities have been developed to be implemented in partnership with the tourism business community in the city and the Heart of Devon Tourism Partnership:

Priority 1 - Encourage and support market led investment in the visitor economy in Exeter; encompassing retail, food & drink, the arts, visitor attractions, accommodation and transport

Priority 2 - Develop the visitor experience within Exeter to make the most of existing assets, individually and jointly, so that the sector provides year round jobs and contributes to a vibrant economy

Priority 3 - Raise skill levels of the existing visitor workforce and prepare those with the potential for entering employment in the sector

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

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

3.8 Following consideration by Scrutiny Committee the Visitor Strategy will be submitted to organisations, partners and agencies relevant to its delivery for comments, further interaction and endorsement. The final version will be presented for approval in January 2012.

4.0 FINANCIAL IMPLICATIONS

4.1 City Council involvement and contribution to delivering the Exeter Visitor Strategy will be met within existing financial resources as summarised in the table below. Where considered necessary, further funding will be sought on a project-by-project basis by a bidding or application process in line with the priorities listed above.

Tourism Unit budget 2011 – 2012	**Gross**	**Income**	**Net**
Tourism Administration Staffing	£148,920	£0	£148,920
Tourism Marketing	£65,300	£0	£65,300
Exeter Visitor Information & Tickets	£184,530	£47,510	£137,020
Underground Passages	£151,490	£74,350	£77,140
Quay House Visitor Centre (funded by ECQT)	£59,180	£55,100	£4,080
Red Coat Guides	£20,790	£10,700	£10,090
	£630,210	**£187,660**	**£442,550**
Heart of Devon (external funding):	**£89,000**	**£89,000**	**£0**

5.0 RECOMMENDED that

5.1 Members support the attached draft Exeter Visitor Strategy for the period 2012 – 2015 being used for consultation with key industry organisations, partners and other agencies relevant to its delivery.

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. Report to Scrutiny Committee – Economy 10 March 2011

Draft Exeter Visitor Strategy

2012 – 2015

1.0 INTRODUCTION

1.1 Tourism is one of England's largest industries. A study of the visitor economy undertaken by Deloitte in 2010 estimated that England's visitor economy is worth £97 billion in total and is the third highest export earner behind chemicals and the financial services. The industry employs in excess of 2 million people and provides opportunities for employment including varied careers and many entry jobs into the labour market. For English tourism to thrive and grow, the industry must remain competitive in terms of cost and ease of access and must offer visitors great experiences in great destinations.

1.2 Tourism is defined as a "movement of people to places outside their usual place of residence, pleasure being the usual motivation", this implies some element of travel from their home. A thriving tourism industry creates beautiful places to visit all year round, which also improves the quality of life for everyone who lives in or near them as well.

1.3 Tourism is a flexible and versatile sector to work in and offers a range of entry level opportunities for school leavers, for people without formal qualifications, for those re-entering the workforce and for part-time or temporary employees. Tourism is particularly labour intensive compared to many other sectors but creates new employment opportunities. The success of the industry depends on a skilled workforce.

1.4 There are still opportunities to grow the tourism sector by making it more productive, competitive and profitable. Domestic tourism offers good growth potential because we currently take significant fewer 'staycation' (holidaying at home) holidays than many other European countries.

1.5 In a challenging economic climate, public sector support for the industry will be less readily available and in the short to medium term, the industry's private sector will operate under tighter budget constraints. This needs to be addressed within this Strategy.

1.6 Cities that have emerged as vibrant destinations have typically done so by developing a wide variety of cultural attractions and continually developing and adding to them. Residents are the main beneficiaries of tourism and retail developments, but they also offer visitors new experiences and reasons to visit.

1.7 Retail is a core part of the visitor offer, which can be seen in the value of tourism to Exeter in the next section. Shops do more than almost anything to influence the appeal of a destination and with the recent developments of Princesshay and the planned development of the old Debenhams building by John Lewis will certainly increase the appeal of Exeter regionally and nationally.

1.8 Tourism development is a central part of regeneration and economic development, it is important to create environments that are highly attractive in which the widest range of people will want to live, work and spend their leisure time. In other words a city should aim to be exceptionally "liveable".

1.9 This Strategy has been developed with the 'Exeter Vision', proposed organisational changes and the current economic climate in mind. The aim of this Strategy is to:

"Further develop the visitor economy in order to create and safe guard employment, through the promotion and development of existing and new visitor facilities, including the Royal Albert Memorial Museum, focusing on the strengths of Exeter as a regional cultural centre. The intention is to increase employment and tourism activity (visitor income) by 5% within the lifetime of the strategy"

1.10 Exeter is a key regional cultural, leisure and shopping destination and has the potential to play an even greater role in meeting the needs of visitors to Devon and the West Country. The most popular reasons for people choosing a 'cultural' tourism destination are listed below, all of which are very evident in Exeter and the Heart of Devon:

- Scenery
- Climate
- Cost of travel
- Cost of accommodation
- Historical interest
- Environment
- A complete change
- Local food & drink

1.11 Exeter is a desirable place to live and contains an eclectic mix of environments from contemporary to historic cityscape. The city is close to a UNESCO World Heritage site (Jurassic Coast), two national parks and two Area's of Outstanding Natural Beauty, all which help raise the profile of the city as a base or as a place for a day visit or short break.

1.12 Visitors to Exeter make a significant contribution to the local economy through their expenditure in supporting the development of new employment opportunities, improving standards of living, helping to increase the profile and positive image of the city and engendering local pride.

1.13 The planned re-opening of the Royal Albert Memorial Museum late 2011, presents Exeter with an exciting and enviable opportunity to gain extensive local, regional and national exposure as a destination investing in its product to attract more day and overnight visitors, groups and conferences to the city.

1.14 Implementation of this strategy is intended to bring many positive economic benefits to the city in sustaining and creating quality jobs within the tourism industry and increase the profile of Exeter as the regional capital of the South

West through private sector investment, as detailed in section four of this Strategy, and public sector investment in the extension and refurbishment of the Royal Albert Memorial Museum. Actions from this Strategy will continue to raise the profile of the city and the surrounding area regionally and nationally.

2.0 BACKGROUND

2.1 **Previous Tourism/Visitor Strategy**

The previous Tourism/Visitor Strategy for Exeter covered the period 2007 – 2010 and highlighted four priority areas for development. Even though the Strategy had to be undertaken amidst the economic downturn, there were a number of significant outcomes and development projects completed.

2.2 Some of these outcomes and development projects include:

- Princesshay development completed;
- Both Exeter Visitor Information & Tickets and Exeter's Underground Passages refurbished and relocated to within the Princesshay development;
- New coach drop-off facility opened at Exeter Bus & Coach Station;
- Four hotel developments completed, another two due to be completed imminently;
- Heart of Devon Tourism Partnership formed with associated membership benefits;
- 38 Heart of Devon members received quality awards;
- spend from day visitors increased by 17%;
- visits to friends and relatives increased by 22%;
- the total amount of bed spaces within Exeter increased by 14%;
- group bookings made through the Tourism Unit increased by 27%;
- usage of Exeter's Park & Ride increased by 11%;

2.3 Facilities managed by the Tourism Unit saw a variation of increases and decreases in their usage as summarised in the indicators later in this Strategy. These variations were attributed to better promotion of visitor facilities within the city, changes in visitor booking patterns and the current economic climate.

2.4 The Royal Albert Memorial Museum closed 2007 for an extensive period of time to enable an extension to be built, access to the Roman Wall to be incorporated to the Museum, complete refurbishment of the Museum, a new collections store to be built and existing collections to be redisplayed and reinterpreted. The closure of the Museum has had a negative impact on the amount of people visiting Exeter for a day or overnight visit, and shows the value of the Museum on the local economy.

2.5 Work will continue on the outcomes and progress made from the previous Tourism/Visitor Strategy, especially in the promotion of new facilities to build the awareness of what there is to see and do in Exeter, regionally and nationally.

Heart of Devon Tourism Partnership

2.6 Strong and developing partnerships have been running in Exeter with neighbouring areas for a number of years. Both the public and private sector see the advantages of working together and pooling resources both financial and personnel as appropriate to achieve common aims. This principle underlies the Heart of Devon Tourism Partnership. The table on page 9 shows the economic value of tourism to Exeter and the Heart of Devon and highlights the need to work with neighbouring partners.

2.7 The Heart of Devon Tourism Partnership is the Area Tourism Partnership, and local membership organisation broadly for the areas of East Devon, Exeter, Mid Devon and parts of Teignbridge. The Tourism Partnership's aim is for the area to be recognised as one of the major holiday destinations within the region through all aspects of tourism promotion, including marketing to the consumer, group and conference market. The Heart of Devon's role is to help businesses to thrive, offer marketing and advertising opportunities, business support initiatives and membership benefits geared to attract the involvement of more tourism businesses whilst returning added value for their financial contribution.

2.8 The Tourism Partnership is a not for profit Company Limited by Guarantee and is led by a private/public sector partnership, ensuring that any profits made are put back into the marketing and development of successful tourism related businesses within the broad area covered by the Heart of Devon. The company was officially formed in 2009 and has grown from strength to strength in gaining more board directors, paid members and delivering more marketing activity. Within the first year of trading, membership was at 150. This has grown to 327 as of August 2011. The first AGM was held in summer 2010 with member seminars held in December 2010 and May 2011.

2.9 The Tourism Unit of Exeter City Council plays a leading role in supporting the Tourism Partnership in delivering marketing activity, delivering a range of membership benefits and working with our neighbouring local authorities. A selection of the marketing activities include:

- Website development and promotion
- Search engine optimisation of www.heartofdevon.com
- Issuing of press release promoting the destination and members
- Inviting and briefing journalists to visit the area
- Developing and implementing themed marketing campaigns promoting the destination and members (culture, family, activity, food & drink and shopping)
- Social media – Twitter, Facebook, Flickr and blogging
- Sending e-newsletters to our database of 45,000 email contacts

2.10 The Tourism Partnership continues to work towards a one-stop shop for both tourism businesses and potential visitors to the area. It is the Partnership's aim to continue to work with the private sector in creating new tourism promotional opportunities, better tourism support services and provide more information on latest developments in the tourism industry across Devon, the

South West and the UK. A well run Tourism Partnerships should speak for both the visitor and the visitor economy.

3.0 ECONOMIC CLIMATE AND MARKET OVERVIEW

3.1 Economic Climate

In the first three months of 2011 GDP grew by 0.5%, in the second three months GDP grew by only 0.2%. Economic recovery within the UK economy has been slower than predicted. The Office of National Statistics view is that growth has slowed due to a number of one-off factors, including the Japanese tsunami, the Royal wedding, Olympic ticket sales and the unseasonally warm weather.

3.2 Some of these one-off factors have a positive impact on the economy, such as the tourism industry. The warm weather in April boosted spending in hotels and restaurants with people holidaying within the UK.

3.3 Central government is still predicting future growth, but according to some economic analysts they may need to re-adjust their predictions.

3.4 The Exeter and the Heart of Devon (East Devon, Mid Devon and Teignbridge) sub-regional economy has remained too date fairly resilient in the economic downturn and will continue to be a base for many profitable businesses. The success of the area is underpinned by many factors including the quality of education, training and research, flexibility of the workforce, transport access, lower operating costs, availability of outstanding development sites, accommodation and housing and the undoubted overall quality of life in Exeter.

3.5 Over the past couple of years, there has been a small decline in the amount of overnight visitors to the area. This is primarily due to the economic downturn and less business visitors to the city. Business tourism activity is now increasing, primarily due to the upturn in the economy nationally, this upturn will be addressed through raising the opportunity for promoting Exeter again to the conference market.

3.6 As previous stated, the closure of the Royal Albert Memorial Museum has had a negative impact on the amount of people visiting Exeter, especially for a day visit. In 2009 there were 1.9% fewer day visitors to Exeter (compared to 2008), with the closure a major contributing factor. Prior to opening, the Tourism Unit will work with the management team of the Museum to ensure there is extensive promotion, especially locally and regionally, of the Museum to increase the amount of day visitors to the city.

Market Overview

3.7 The national economic situation has had a notable impact on the tourism industry. The national tourism body 'Visit England' has undertaken several research projects on the effect of the economic downturn.

3.8 Results of national surveys include:

- Fewer domestic and overseas holidays taken in 2010 than at any point in the past 5 years;
- Over 75% feel the economic situation will get worse before it gets better;
- Almost half of respondents now expect their financial situation to get worse;
- Most affected by the economic downturn are 35-54 year olds, who account for over 40% of all domestic trips and spend;
- For those that holidayed in England, it made them want to take more holidays in England;
- Beyond 2011, the expectation is for more 1-7 night England breaks, but fewer 8+ night breaks;
- 18-34 year olds, AB's socio economic group and families are more likely to continue to take more holidays in England beyond 2011;
- Some 53% of the population make a trip to experience the atmosphere of a historic town at least once a year;
- Longer breaks and countryside destinations deliver the best rated holiday experience;
- Taking part in outdoor leisure pursuits leads to a more positive experience;
- Self catering and camping holidays deliver the best accommodation experience;
- Large cities and towns account for the most trips and spend but relatively fewer bed nights.

3.9 The main reasons for people to be likely to take more holidays in England are:

- Overall cost of the holiday/state of the economy;
- To go somewhere new and explore the rest of the UK;
- Return to a place they like;
- Easier to holiday in the UK than overseas.

3.10 The latest data from the Great British Tourism survey shows that in April 2011, the number of domestic overnight trips taken in England was 8% higher than in 2010, with a 14% increase in the amount spent whilst on holiday. Both measures were at their highest level since the current survey began in 2006. This is likely to be a result of the double bank holiday combined with unusually warm spring weather as mentioned previously.

3.11 The future predictions for the tourism industry within England are positive, but there is still concern regarding the effects of the national economy on the industry.

Value of Tourism

3.12 According to the Cambridge Economic Impact Assessment, which was undertaken by South West Tourism in 2009, Exeter attracted some 1.94 million visitors who spent £159.7 million, supporting approximately 3,766 jobs in the city.

3.13 Shopping is the primary activity when visiting Exeter for a day visit and eating out for an overnight stay. With the planned retail developments within Exeter this will make it an even more appealing destination to visit for a day and overnight visit.

3.14 The table over shows a breakdown in the volume and value of tourism to the Exeter economy in 2009. Visitors are spending more when they visit Exeter for an overnight stay helping with the creation and protection of jobs within the industry.

- Day visitor spend - £50
- Overnight visitor spend - £198

3.15 The table also highlights the importance of working with our neighbours. Approximately £181.5 million is spent by overnight visitors to East Devon, Mid Devon and Teignbridge on shopping, food & drink and visiting attractions.

Economic impact of tourism within Exeter and the Heart of Devon 2009

	Exeter	East Devon	Mid Devon	Teignbridge	TOTAL
Direct actual jobs	2,882	6,340	1,772	4,710	15,704
Indirect actual jobs	884	1,737	300	1,332	4,253
TOTAL ACTUAL jobs	3,766	8,077	2,072	6,042	19,957
Day visits	1,580,000	2,686,000	1,145,000	2,497,000	7,908,000
Total Day visit spend	£79.5 million	£118.9 million	£49.6 million	£112.4 million	£360.4 million
▪ Shopping	£34.9 million	£39.1 million	£18.1 million	£40.1 million	£132.2 million
▪ Food & Drink	£29.5 million	£49.7 million	£19.8 million	£45.5 million	£144.5 million
▪ Attractions & Entertainment	£7.7 million	£13.1 million	£6.0 million	£12.4 million	£39.2 million
▪ Travel	£7.4 million	£17.0 million	£5.7 million	£14.4 million	£44.5 million
Overnight trips	361,000	757,000	211,000	591,000	1,920,000
Total Overnight trips spend	£71.6 million	£157.1 million	£35.8 million	£112.4 million	£376.9 million
▪ Accommodation	£25.1 million	£58.1 million	£13.0 million	£41.2 million	£137.4 million
▪ Food & Drink	£15.0 million	£34.3 million	£8.0 million	£24.9 million	£82.2 million
▪ Shopping	£12.8 million	£22.7 million	£5.5 million	£16.4 million	£57.4 million
▪ Travel	£10.1 million	£24.6 million	£5.5 million	£17.8 million	£58 million
▪ Attractions	£8.6 million	£17.4 million	£3.8 million	£12.1 million	£41.9 million
Visits to friends & relatives spend	£8.5 million	£9.1 million	£5.2 million	£8.7 million	£31.5 million
Other tourism spend	£0.1 million	£1.9 million	£0.1 million	£0.6 million	£2.8 million
TOTAL TOURISM SPEND	**£159.7 million**	**£287 million**	**£90.7 million**	**£234.1 million**	**£771.5 million**

4.0 DEVELOPMENTS

4.1 On the basis of existing tourist facilities, Exeter is seen as a traditional heritage destination within the South West. With the opening of Princesshay late 2007, at a cost of £225 million, the primary reason for visiting Exeter for a day visit has changed to shopping. Over the next 4 years Exeter will be undergoing a significant period of change due to a number of new visitor related developments, including:

4.1.1 **development and extension of the Royal Albert Memorial Museum** – refurbishment and extension of museum, re-display and re-interpretation of existing collection. New access to Roman Wall, due to re-open winter 2011. The re-opening presents an ideal opportunity for revisiting the coordinating of attraction promotions and co-ordination of other activities in the city.

4.1.2 **development of Exeter's Historic Quayside** – mixed use regeneration of redundant buildings and water based activities, completion due 2012 – 2013.

4.1.3 **Quay Climbing Centre** – dedicated indoor climbing wall and café located within the Old Electricity Works building, due to open September 2012.

4.1.4 **cycle network along Exe estuary** – new National Cycle Network (NCN) around the Exe estuary from Exmouth to Dawlish, due to be completed financial year 2013 – 2014.

4.1.5 **development of the old Debenhams building** – complete refurbishment of the building to house a state of the art John Lewis. It will offer an edited collection of products across fashion, home and electronics. Work will be undertaken on enhancing the junction of Paris Street and High Street to allow for restricted traffic access and greater public access. Due to be completed autumn 2012.

4.1.6 **Exeter Airport** – proposed improvements and developments will provide a capacity of approximately 2 million passengers per year by 2015. To accommodate the predicted growth a series of extensions, development and modifications will take place on existing terminal buildings. Long-term parking will be developed on new land to the south east of the Airport. 160 bedroom Hampton by Hilton hotel due for completion by winter 2011.

4.1.7 **Flybe Training Academy** – new Flybe training academy recently opened, which will be a centre of excellence providing training solutions for the needs of Flybe, Exeter International Airport and other organisations.

4.1.8 **Chapter Hotel Exeter** – refurbishment and extension of Hotel Barcelona, new hotel due to open autumn 2012.

4.1.9 **University of Exeter** – £275 million investment programme on the Streatham Campus to include projects such as the Business School expansion, INTO Academic Centre, refurbishment of the library and the flagship Forum. The Forum will be the main visitor and student reception area for the University. It will be a mix of outside and inside space to include student services, retail, catering, technology-rich learning spaces and a 400-seat lecture theatre. Development work due to be completed summer 2012.

4.1.10 **University of Exeter, Thomas Hall** – 97 bedroom conference hotel and restaurant at Thomas Hall. Due to be completed 2012.

4.1.11 **Dean Clarke House** – 250 seater restaurant due to open Spring 2012 (Exeter's Cosy Club), located on the ground floor of the Halford Wing of Dean Clarke House.
Awaiting planning application for new hotel development, due summer 2011.

4.1.12 **Exeter Bus Station** – redevelopment of the Exeter Bus & Coach Station site, no formal plans submitted, at the time of writing. There is the opportunity to expand the city centre offer, with an enhanced bus station with overnight bus parking located elsewhere within Exeter.

4.2 Following a ten year period of major positive change the city continues to attract private sector investment, as shown above. The city centre is likely to grow physically to respond to this growth and deliver everything a great city of its potential size and status requires – such as the Exeter Bus Station development. The developments listed within this strategy show that there is private and public sector confidence in Exeter as a focus for investment, an important thriving centre for commerce, culture and leisure. The new City Centre Vision builds on successes realised to date and sets out a vision for the spatial development of the city centre over the next 15-20 years.

5.0 MARKET SEGMENTATION

5.1 During 2010 the Tourism Unit commissioned an Exeter based company (The Marketing Department) to undertake research on the type of visitor to Exeter and the surrounding area, Heart of Devon.

5.2 For the past 5 years the Tourism Unit has been collecting data on who requests a Visitor Guide on the area – name, address and postcode. To date there are over 105,000 contacts on the database. This database is an extremely valuable source of information on where customers live and provides 'warm leads' on people wishing to visit the area. This database was analysed through ACORN, which is a geodemographic segmentation of the UK's population which breaks down small neighbourhoods and postcodes into 5 main categories and 17 groups (below):

- **Wealthy Achievers**, comprising of:
    - Wealthy Executives
    - Affluent Greys
    - Flourishing Families
- **Urban Prosperity**, comprising of:
    - Prosperous Professionals
    - Educated Urbanites
    - Aspiring Singles
- **Comfortably Off**, comprising of:
    - Starting Out
    - Secure Families
    - Settled Suburbia
    - Prudent Pensioners
- **Moderate Means**, comprising of:
    - Asian Communities
    - Post-Industrial Families
    - Blue Collar Roots
- **Hard Pressed**, comprising of:
    - Struggling Families
    - Burdened Singles
    - High-Rise Hardship
    - Inner City Adversity

5.3 The database we hold is considered to be broadly representative of the UK population as a whole, demonstrating the diverse appeal of the area and the range of things to see and do. The largest family categories found in the database are Secure Families and Struggling Families. Better off non-family groups are very well represented, such as the Affluent Greys and Educated Urbanities.

5.4 Over the last 5 years the database has increased numbers of contacts held in the second most affluent category – Urban Prosperity, which are well-educated and mostly prosperous people living in major towns and cities, including both older wealthy people and highly-educated younger professionals moving up the corporate ladder.

5.5 The characteristics of typical visitors to Exeter and the Heart of Devon:

- Originate from the South East, West Midlands or the South West;
- Are approximately 45 – 54 years old;
- Are from the C1 / A / retired socio economic class;
- The majority have no children living at home (61%);
- 76% have visited the area within the last 5 years;
- The vast majority travel to the area by car (93%);
- Prefer to stay for one week;
- Prefer to stay in a self catering unit.

5.6 The research also gave an insight into what are the top factors for visitors choosing a holiday within the UK:

- Overall cost of the holiday;
- Spending time outdoors;
- Escaping from the crowds;
- Being near the coast;
- Visiting somewhere new.

5.7 And once on holiday within Exeter and the Heart of Devon, they like to enjoy the following activities:

- Eating and drinking out;
- Walking;
- Shopping;
- Attending events & festivals;
- Cycling.

5.8 Overall, 66% of respondents to the survey indicated that they are very likely to visit Exeter and the Heart of Devon. From the results of this survey, and the results of the survey undertaken by Visit England, work will be undertaken on our existing customer database to encourage them to visit Exeter and the Heart of Devon, instead of holidaying elsewhere within the UK. This will be undertaken through developing and implementing targeted thematic marketing campaigns, which recognise that many people are motivated by a particular activity or interest. It is also a useful mechanism to tie together a particular range of products and present them to our customers, such as activity holidays.

6.0 SWOT ANALYSIS

6.1 Exeter has an array of assets that mark out the City's offer as a place in which to live, work, trade, invest, visit and study.

6.2 It is going to be difficult for Exeter to stand out from the crowd, particularly as the majority of other destinations within the UK are promoting themselves heavily in light of the economic downturn and the 'staycation'. As mentioned in the Exeter Place Marketing Strategy, a weakness is its lack of an iconic symbol that grabs and holds national and international attention and places the City at the forefront of people's minds.

6.3 The SWOT analysis below has been produced listing some of Exeter's visitor assets and market conditions.

STRENGTHS	WEAKNESSES
Visitor & product - Recent and planned new retail and hotel openings within Exeter - Excellent transport links train / road / air - Well regarded Museum (RAMM) - Very strong heritage appeal - Exeter International Airport within close proximity of the city centre - A well-established visitor destination - Close to the Jurassic Coast - Close to stunning countryside (Dartmoor National Park, East Devon and Blackdown Hills Area of Outstanding Natural Beauty) - Availability of local food & drink - Award winning and Top 10 University - Michael Caines: local chef, recognised regionally and nationally - Exeter Chiefs remain in the Premier League - Growth in German market due to city being a location for Rosamund Pilcher films ***Market conditions*** - Strong public/private sector tourism partnership - Regional admin hub - base for a large number of national organisations - Relatively low unemployment in the city - Employment cluster in tourism and food & drink	***Visitor & product*** - Perception of travel time from the Home Counties & London - A sometimes old fashioned image of the area, in particular Devon - No readily identifiable iconic or internationally known building - Unpredictable weather patterns ***Market conditions*** - Perceived as expensive to holiday overnight - VAT rate of 20% remains the same - Reduced budget available through Visit Devon to promote the county

OPPORTUNITIES	THREATS
Visitor & product - The re-opening of the Royal Albert Memorial Museum - Olympics 2012 – Weymouth - An active ageing population - Growth in special interest and activity holidays - Cultural tourism including events, festivals, carnivals, regattas and music - People who live within the South West visiting Exeter - Expansion of conference facilities (University & Sandy Park) within Exeter - Grow the short break market within the city - New hotel openings during 2011 and 2012 - The opening of John Lewis, autumn 2012 ***Market conditions*** - Heart of Devon Tourism Partnership, further national promotion of the area - New route development at Exeter Airport - Emerging markets continue to grow – China, Russia, Brazil and India - Further growth in the staycation market - Merging of Area Tourism Partnerships within Devon to reduce back office costs	***Visitor & product*** - Mortgage holders, public sector workers and 18-24 year olds report the worst outlook for their finances (Feb 2011) - Disposable income declined at fastest pace since Feb 2009 (Feb 2011) - Risk of Exeter being perceived as suffering from traffic congestion ***Market conditions*** - Economic growth reduces further - Rising oil / petrol prices making it more expensive to travel to the area - On-going growth in competition from other UK destinations - Unforseen external factors such as weather (wet summer) - Reduction in membership levels of the Heart of Devon Tourism Partnership (reduced income) - Continued economic downturn - Competition from other European destinations

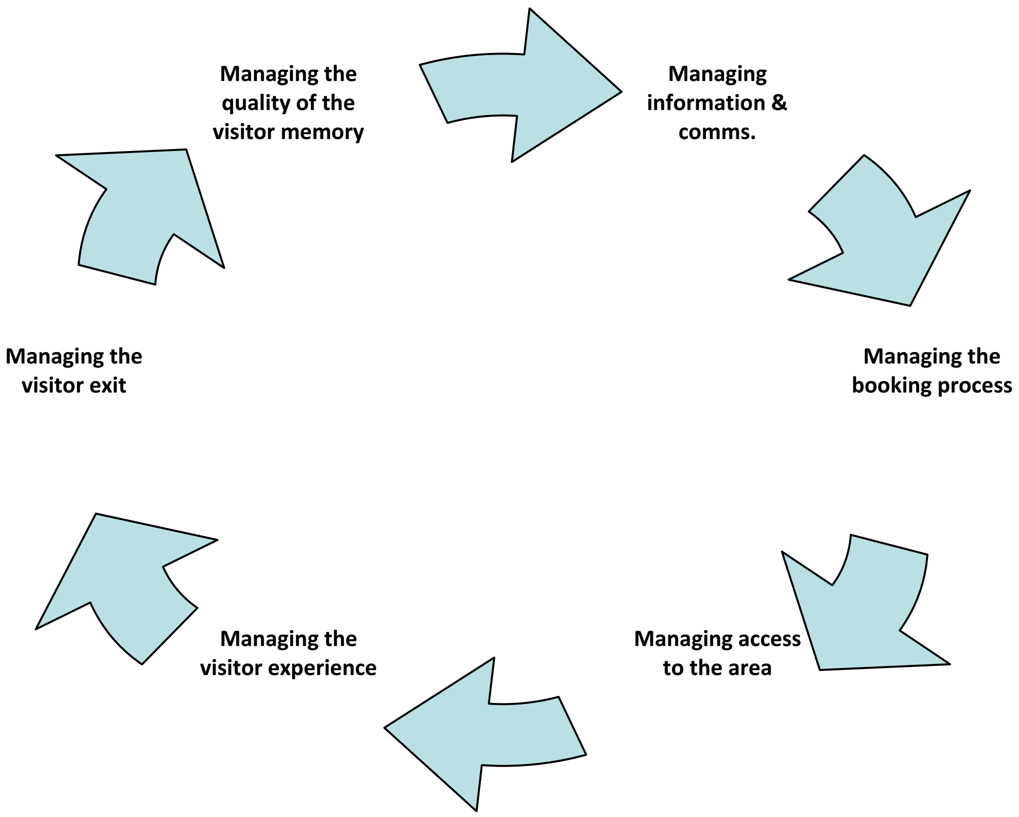
7.0 THE VISITOR JOURNEY

7.1 The visitor experience is not just about when people are on holiday, their experience starts when a customer first searches for information on places to visit and stay and lasts right through to after they have departed.

7.2 The Visitor Journey ©, which was researched and developed by LiveTourism, has 6 stages where a positive impact can be made, it also enables destination managers to identify where there is overlap and duplication of activity and spending.

7.3 The Visitor Journey © model is a management tool that can be used for specific visitor attractions to improve customer service and increase visitor numbers. It can also be used by a destination, such as Exeter to improve access, increase awareness of the destination and thus increase the amount of people who visit.

7.4 The 6 stages of the Visitor Journey © can be seen below and will be an integral part of improving the visitor experience within Exeter. Ensuring visitors have an excellent experience from the first stage of the journey in making a decision on where to visit right through to managing their memory of their time in the city.



7.5 **Managing Information and communication – planning of the journey, holiday and anticipation**

This area looks at printed information a destination provides, as well as their website and other sources of information available. First impressions are important, a destination needs to look at the information they provide and are they providing information customers need. In terms of destination managers, a range of activities can be implemented to understand customers needs and wants more:

- Economic impact models
- Market intelligence
- Seasonal and themed marketing campaigns
- Visitor and information services (websites, printed guides and TIC's)
- Destination branding

7.6 **Managing the booking process – booking the journey and holiday**

How easy is it for a customer to book a holiday or accommodation within your destination. If a customer can't book quickly with you, they will book elsewhere! This area can be addressed through:

- Online booking available on destination website
- Early booking incentives
- Accommodation establishments having online booking on their own websites
- Can a customer book through another source, such as travel or booking agents

7.7 **Managing access to the area – travel to the destination**

How easy it is for a customer to reach your destination by car, by bus, by train or by plane? Once at the destination is the highway signage clear and is the local tourism map clear?

This area will be addressed through:

- Public transport to and within the destination
- Welcome audits at public transport interchanges
- Cycle access and information
- Itinerary planning once on holiday

7.8 **Managing the visitor experience – the experience in the destination**

Everybody appreciates a warm welcome when on holiday. How do you then make the rest of their visit an experience to remember?

This area will be addressed through:

- Improving the quality of visitor facilities (accommodation, attractions and eating out)
- Improving the customer service
- Encouraging private sector investment (new and existing facilities)

7.9 **Managing the exit – going home**

Leaving is still part of the visitor journey. How can a destination make a good final impression?

This area will be addressed through:

- Providing route information
- Encouraging visitor feedback
- Complaint handling, visitor facilities being consistent

7.10 **Managing the quality of the visitor memory – recollection of the experience**

Do keep in touch with visitors because you want them to come again. You can keep in touch with postcards, emails, newsletters or a Christmas card.

This area will be addressed through:

- Encourage businesses to keep in touch with their customer
- Visitor relationship management – e-newsletters
- Profiling previous visitors
- Surveying visitor likes and dislikes

8.0 VISITOR INFORMATION

8.1 Nationally the usage of Visitor Information Centres has reduced over recent years due to the rise in the use of the internet to source information on holidays, mobile devices (phones) and user generated content (social media).

8.2 In the UK 76% of the population, equating to 46.8m people, use the internet on a regular basis. The internet is regarded as the main source of information for travel planning and booking. 24% of the UK mobile phone users have browsed the internet with their handsets, smart phone usage grew by 193% from February 2009 to February 2010.

8.3 User generated content has grown exponentially and is becoming more sophisticated, particularly in terms of video content on YouTube. Consumers (visitors) will increasingly use their preferred sources, the most reliable, to inform their choices when choosing between places to visit in the UK and overseas. Work undertaken to promote Exeter and the Heart of Devon as a desirable visitor destination needs to take into account user generated websites and work with them to provide reliable and up to date information.

8.4 The provision of visitor information is not the same as marketing, although it is a vital part of the marketing process. Visit Britain's 2009 research into the economic impact of Tourist Information Centres confirms that destinations, such as Exeter, benefit substantially from hosting informed visitors who then stay longer and spend more in the destination and will potentially move onto neighbouring towns and villages, supporting the sub-regionally economy.

8.5 The provision of high quality visitor information can play a significant role in enhancing the overall visitor experience by creating a positive image of a destination and providing a hospitable and friendly welcome.

8.6 Businesses such as visitor attractions, hotels, retailers, restaurants, transport operators, car rental companies, public houses, village shops, petrol stations and post offices will find that they can increase their customer satisfaction by providing visitor information as part of their overall service.

8.7 A report is due to be released imminently from Visit England on the provision and development of visitor information. This report will need to be taken into account when looking at sustaining and developing the City Council's facility - Exeter Visitor Information & Tickets. There are early indications that Visit England is looking to broker new national partnerships including franchise agreements with key public/private organisations such as hotel chains, book shops and post offices to provide local visitor information. No further information has been made forth coming on these proposals. To ensure Exeter Visitor Information & Tickets remains viable, they need to provide excellent customer service, information that customers require, keep costs to a minimum, keep apace with advances in technology and have great visability.

8.8 Over the past couple of years pedestrian and highway signage has improved greatly to the Information Centre in Exeter, there are still occasions occurring with visitors unable to find the Information Centre quickly. An audit will be undertaken to help improve pedestrian and highway signage to the Information Centre to improve customer service and visitor numbers.

8.9 To ensure Exeter Visitor Information & Tickets and other the visitor facilities managed by the Tourism Unit provide outstanding customer service, there will be the requirement for staff to attend the range of 'Welcome to Excellence' courses. These include Welcome Host, Welcome Host Plus and the newly introduced Welcome Host Gold which is a practical course using training styles to give participants the skills and knowledge they can immediately use in the workplace. Welcome Host Gold has been introduced to give front line members of staff a greater understanding of customer service and the knock on effects of good customer service.

8.10 Since the Exeter Northcott transferred their Box Office up to the Theatre on the University Campus, work has been undertaken on utilising spare desk space and staff experience and skills within the Information Centre to develop the range of tickets on sale. During spring and summer 2011 the range and level of tickets sale has grown exponentially and beyond all expectations. This service will be continually developed as ticket sales are a valuable source of income for the Information Centre and brings in extra customers through the door. The activity is clearly providing a desired service by customers.

9.0 AIM AND PRIORITIES

9.1 It is important to be realistic about what can be achieved and supported. It is also important to build upon the achievements of the previous Visitor/Tourism Strategy and recent city centre developments by implementing the five agreed priorities in partnership with the tourism business community of Exeter and the Heart of Devon.

9.2 The aim of the strategy should be to:

"Further develop the visitor economy in order to create and safe guard employment, through the promotion and development of existing and new visitor facilities, including the Royal Albert Memorial Museum focusing on the strengths of Exeter as a regional cultural centre. The intention is to increase employment and tourism activity (visitor income) by 5% within the lifetime of the strategy"

9.3 The following action plan details key areas of work within the tourism industry that need addressing over the next four years, taking account of market opportunities, developments in infrastructure and the wide range of capital investment taking place in and close to the city. The actions are grouped under each of the five priorities listed below.

9.4 The priorities for the Strategy are:

9.4.1 **Priority 1 -** Encourage and support market led investment in the visitor economy in Exeter; encompassing retail, food & drink, the arts, visitor attractions, accommodation and transport

9.4.2 **Priority 2 -** Develop the visitor experience within Exeter to make the most of existing assets, individually and jointly, so that the sector provides year round jobs and contributes to a vibrant economy

9.4.3 **Priority 3 -** Raise skill levels of the existing visitor workforce and prepare those with the potential for entering employment in the sector

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

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

10.0 ACTION PLAN

10.1 Progress towards priorities and the relevant actions will be reviewed annually to ensure they are still tested under the five key priorities of the Strategy relevant to market conditions, opportunities and trends. The final version of this action plan following consultations will include timescales for delivery.

Priority 1 - Encourage and support market led investment in the visitor economy in Exeter; encompassing retail, food & drink, the arts, visitor attractions, accommodation and transport			
REF	ACTION	PARTNERS	OUTCOME
1.1	Help to deliver sustainable mixed use development in Exeter through the production of a master plan for the development of Exeter Bus Station	Stagecoach DCC Land Securities Private investors	New city centre bus station, to include mixed use development
1.2	Work with public transport providers to provide integrated transport with bus links to the main train stations and visitor destinations in Exeter and the Heart of Devon	Stagecoach First DCC Dartline Country Bus	Residents and visitor able to visit the main attractions in by public transport
1.3	Work with public transport providers to improve existing bus services from Exeter Airport to the city centre, stopping at Honiton Road Park & Ride for Sowton & the Met Office	Stagecoach Exeter Airport	Reliable and frequent bus service from the airport to the city centre, linking in with the arrival of flights
1.4	Work with Stagecoach to develop suitable facilities for visiting coach drivers at Exeter Bus Station	Stagecoach Land Securities	An increase in coaches visiting Exeter due to improved facilities for drivers
1.5	Work with Exeter Airport, First Great Western and Stagecoach to undertake 'Welcome Audits' at the main points of entry for visitors to ensure signage and information available is suitable for a friendly and welcoming visit	Exeter Airport First Great Western Stagecoach	Improved customer service, signage and welcome for visitors.
1.6	Work with existing visitor attractions in Exeter to ensure they	Visitor attractions	Improved customer service and visitor

	understand and respond to the expectations of visitors and residents	within the city	numbers at attractions. Time spent in the city increase.
1.7	Work with visitor related businesses relocating or opening in Exeter to ensure they receive media exposure locally, regionally and nationally	PR agency Businesses relocating to the city ED	Greater range of visitor attractions and facilities available. Enhanced exposure of Exeter regionally and nationally.
1.8	Undertake a comprehensive visitor survey in Exeter to understand the needs and concerns of our customers/visitors and help inform any future development of the visitor experience and promotion of the city	City Centre Manager E&HODHRA City visitor attractions City eating out venues	Greater knowledge and understanding of the visitor needs and requirements informing actions to improve the visitor experience and promote repeat visits.
1.9	Work with new hotel openings within Exeter to ensure the facility is promoted to the short break, conference and group market, where suitable	Private investors PR agency	Increased awareness of the extent and quality of Exeters offer as a visitor, conference and group destination. Increase in visitors to the city.
Priority 2 - Develop the visitor experience within Exeter to make the most of existing assets, individually and jointly, so that the sector provides year round jobs and contributes to a vibrant economy			
REF	ACTION	PARTNERS	OUTCOME
2.1	Work with the Planning Department to ensure the interpretation, signage and experience of the city's quarters is informative, engaging and accessible	Planning Department City Centre Manager City centre traders Quay traders	Increased resident and visitor awareness of the quarters within Exeter. Businesses within the quarters adopt the quarters.
2.2	Investigate the potential to introduce 'meet & greet' ambassadors for day visiting coaches, guiding visitors to the Information Centre, attractions, shops and eating out venues	Stagecoach Potential sponsor EVIT City centre attractions	Increase in the amount of coaches visiting, and staying longer. Increase in visitor numbers to visitor attractions. Increase visitor spend.
2.3	Promote the concept of quality as an attraction to visitors and in terms of the image of the city, to tourism businesses within Exeter &	Attractions, accommodation,	Increase in visitors who then stay longer and spend more within Exeter.

	the Heart of Devon	eating out venues, transport providers	
2.4	Investigate the potential for Exeter to enter the national Purple Flag scheme www.purpleflag.org.uk	City Centre Manager City attractions retail and eating out venues Cleansing Car parks	Exeter is promoted as a safe and clean place to visit for a night visit. Increase in the amount of people visiting Exeter.
2.5	Develop walks and itineraries that are integrated with the main public transport hubs and meet the needs of the visitor within Exeter and the Heart of Devon	Stagecoach First Country Bus Devon & Cornwall Rail Partnership SWCP EDONAB BHAONB	Increase in public transport use. Increase in the amount of people using Exeter as a bas for a walking holiday.
2.6	Work with Devon County Council on improvements to the national tourist brown signs scheme currently being reviewed by central government	DCC	Improved highway signage (brown signs) throughout the city promoting key attractions.
2.7	Review and develop Exeter Visitor Information & Tickets in light of reduced budgets, to include investigating: • having shared use within the Information Centre with a suitable tourism related business • having attended mobile information point(s) around the city • having unattended visitor information point(s) throughout the city	EVIT Land Securities Enjoy England Event venues	Increased awareness of EVIT. Increased visitor footfall and income. Increased bookings and repeat visiting.

	• the use of volunteers within the Information Centre • the benefit of maintaining or increasing tickets sold within the Information Centre		
2.8	Develop existing visitor facilities that are less weather dependant through either events or product development, to extend and increase their appeal to visitors throughout the year	City centre attractions	Extended off peak season. Increase in visitor numbers and spend.
2.9	Support, through promotion, a range of events and festivals that can increase visitors to Exeter	City centre events and event venues.	Increase in event promotion, awareness and visitors to Exeter.
2.10	Support the development of local stewardship / visitor payback programmes for visitors and residents that encourage a greater understanding in the need to care for the city and it's environment. Pilot Scheme introduced by South Hams District Council – On the Right Tracks, where a small levy on refreshments sold to visitors produces a fund for investment in environmental improvements	Exeter attractions, eating out venues and accommodation. Countryside Team DWT	Scheme introduced to implement improvement schemes within and surrounding Exeter.
2.11	Provide timely, accurate and efficient information on Exeter for visitors, online and through other media sources	City Centre Manager HODTP	Increase in website hits to www.exetershopping.org Enhanced Exeter information available on various visitor websites Increased awareness of Exeter as a visitor destination and increased numbers of visitors.
2.12	Work with the Red Coat Guide committee in improving the service offered to visitors and groups	Red Coat Guides	Increase in new and repeat visitors on guided tours. Increase numbers of booked tours.
2.13	Research the potential for alternative forms of delivery and management for Exeter's Underground Passages, providing suggested alternatives by December 2011		Greater investment in the visitor attraction. Potential for economies.

Priority 3 - Raise skill levels of the existing visitor workforce and prepare those with the potential for entering employment in the sector			
REF	ACTION	PARTNERS	OUTCOME
3.1	Introduce Welcome to Exeter and Welcome to the Heart of Devon familiarisation visits for local tourism facilities and services, primarily aimed at front line staff	DCC SWTA Exeter College	Frontline members of staff have greater knowledge of Exeter & the Heart of Devon visitor facilities. Increased level of customer service and reputational / image benefits.
3.2	Ensure that all Tourism Unit frontline members of staff have been trained in Welcome Host, Welcome Host Plus and Welcome Host Gold	Exeter College SWTA	Increased customer service and repeat visitors to visitor attractions and Exeter.
3.3	Develop a short training programme for taxi companies and their drivers to be ambassadors for the city	Licensing Dept. Taxi operators	Taxi drivers have greater knowledge of events, attractions and accommodation in Exeter. Increased customer service and reputational / image benefits.
3.4	Investigate the provision of work trial, work experience within visitor facilities managed by Exeter City Council to raise skills and experience	Exeter College E&HODESB	Volunteers receive the relevant skills and experience to enable them to enter employment within the tourism industry.
3.5	Ensure that staff working within visitor facilities managed by the Tourism Unit are able to transfer skills and experience between facilities	EVIT Quay House Visitor Centre Underground Passages	Staff able to work in all centres managed by the City Council. Potential to reduce staffing budget and greater flexibility of operations. Increased customer service.
3.6	Work with the Economic Development Team to produce and implement sector development plans, specific to tourism and food & drink, to support the development and creation of businesses and jobs	Exeter College E&HODESB Visitor attractions and accommodation	Business development and skills training plans for the tourism and food & drink sector. Increase in investment in the sector.

		City Centre Manager	Well run, quality businesses based in the city.
3.7	Ensure that there is strong support for the tourism and food & drink sector within the Heart of the South West Local Enterprise Partnership for Exeter and the Heart of Devon	Exeter Chamber of Commerce DCC HODTP	LEP provides effective support for strategic infrastructure and other developments including access to development funding.
3.8	Work with the Exeter & the Heart of Devon Employment & Skills Board: • to ensure new hospitality businesses are supported through the recruitment of new staff and ongoing staff development • to help existing hospitality businesses recruit significant numbers of new staff, through either expansion or the opening of a new season • to assist tourism businesses to set up and support apprenticeships • to bid for funding to support and help deliver leadership and management training for hospitality businesses	E&HODESB Exeter College HOSWLEP DCC Exeter Chamber of Commerce	Increase in level of customer service. Reduced staff turnover. Reduce unemployment within the city. New businesses to the city are able to recruit qualified and experienced staff. The city's reputation grows as a desirable location to relocate to.
Priority 4 - Develop more effective and targeted visitor marketing of Exeter locally, regionally and nationally			
REF	ACTION	PARTNERS	OUTCOME
4.1	Differentiate Exeter from other cities within the UK, through promotional activity and events that highlight the unique character of the city	Event organisers and venues Attractions Visit Devon	Awareness of Exeter grows nationally as a vibrant and cultural place to visit. Attendance at city events and venues increases.
4.2	Work with the management team of the Royal Albert Memorial Museum to: • promote the re-opening of the visitor attraction, due to re-	RAMM PR Agency Visit Devon	Substantial press publicity achieved regionally and nationwide. Increase in visitor numbers and spend to

	open December 2011, locally, regionally and nationally • develop short break packages with accommodation providers promoting national touring exhibitions • share expertise and resource in order to improve promoting the Museum, other visitor attractions and the city as a heritage and cultural destination • promote the facility as a conference and meetings venue • promote the facility to group organisers and schools • develop joint ticketing of heritage attractions within the city • ensure that a selection of the Red Coat Guided tours incorporate and visit the Museum • ensure that all heritage attractions are cross marketed within each facility, on printed guides and websites	Local press Local accommodation providers Heart of Devon	Exeter.
4.3	Promote Exeter through the use of social networking, viral marketing, smartphone apps and new technologies	Website hosting company	Increased awareness of Exeter to a younger audience. Increased attendance at visitor attractions and events.
4.4	Work with Devon County Council on the promotion of the completed 'Exe Estuary Trail' - due for completion financial year 2013 – 2014	DCC HODTP Visit Devon Sustrans	Increase in people visiting the city and using the city as a base for cycling holidays.
4.5	Develop a brand for the promotion of Exeter to the visitor market, complimenting the Heart of Devon brand and reviewing 'It's a Capital City'	HODTP City Centre Manager Exeter Chamber of Commerce Visit Devon	Increase the awareness of Exeter. Increase in visitor numbers and spend to the city. Businesses throughout the city adopt the brand.

4.6	Translate key visitor publications, and or information, (available to download as PDF's) into German, Italian, Spanish, French, Russian and Dutch	Twinning Associations University of Exeter	Overseas visitors visit more attractions within the city. Overseas visitors spend more time and money within the city.
4.7	Work with the organisers of the Olympic Torch Relay to ensure a safe and enjoyable event is held and Exeter gains national exposure on radio, TV and press	Torch relay organisers Arts & Festivals Team Exeter event organisers DCC – Highways Cleansing PR agency City Centre Manager	Substantial regional and national promotion of Exeter. Increase in visitors to Exeter.
4.8	Re-design and re-launch the website www.exetershopping.org with an associated promotional campaign	City Centre Manager Exeter Chamber of Commerce City centre retail businesses City centre attractions and accommodation	New website launched. Increase in website hits. Increase in awareness of the city. Increase in visitors and spend to the city.
4.9	Develop and implement a plan for the co-ordinated promotion of cultural and visitor attractions (including the Museum) to attract more visitors and exploit their income earning potential	RAMM St Nicholas Priory City visitor heritage and cultural attractions PR agency	Promotional and management plan developed. Increase in visitors and spend to the city. Increase in visitors to individual attractions.
4.10	Audit regional and national tourism websites covering information on Exeter to ensure data is up to date and covers all visitor facilities	Tourism Unit	Information on Exeter is up to date on other tourism regional and national websites

Priority 5 - Build on work already undertaken to further develop the Heart of Devon Tourism Partnership, to secure additional funding, implement additional marketing of the area and broaden its business development activities			
REF	ACTION	PARTNERS	OUTCOME
5.1	Work with the organisers of the Exeter Food & Drink Festival in the promotion of the event locally, regionally and nationally	Food Festival organisers PR agency Food producers HODTP Visit Devon	Increase in visitors to the Food Festival. Increase in visitors and spend to the city. Increase in awareness of Exeter. regionally and nationally as a 'foodie' destination.
5.2	Support and encourage the implementation of the Heart of Devon brand throughout Exeter and the rest of the Heart of Devon to build the profile of the 'Heart of Devon' brand in the marketplace	HODTP HODTP members Visit Devon PR agency	Members and Tourist Information Centres adopt the Heart of Devon brand. Heart of Devon brand recognised as the mark of a known visitor destination.
5.3	Increase local, regional and national PR of the Heart of Devon area and its members through the appointment of a specialist PR agency to ensure Heart of Devon is featured in regional and national newspapers and magazines	DOTP HOD members Visit Devon PR agency	Heart of Devon is featured in 12 national newspapers / magazines. Increase in visitors and spend to the Heart of Devon area.
5.4	Commission a regular visitor economic impact assessment for Heart of Devon (STEAM, Cambridge or a suitable alternative)	Research company City attractions City accommodation	Report produced which assists monitoring effectiveness of actions detailing: • trends in visitor numbers • how much visitors spend within Exeter and the Heart of Devon • where they spend their money • jobs supported by visitor spend
5.5	Work with Devon County Council, relevant Parish Council's and	DCC	Two new interpretation centres open.

	other bodies on the development and promotion of two new Jurassic Coast interpretation centres at Exmouth and Seaton	Parish Councils HOD members	Regional and national promotion of Seaton, Exmouth and the Heart of Devon. Increase in visitors and spend to Seaton and Exmouth with potential additional visitors to Exeter.
5.6	Work with the Jurassic Coast team in the promotion of the Jurassic Coast (East Devon), to build the profile locally, regionally and nationally as a must visit destination with consequential benefit for Exeter businesses	TIC's along the Jurassic Coast HOD members DCC Visist Devon Jurassic Coast team PR agency	Jurassic Coast featured on regional and national tourism websites. Extensive information on the Jurassic Coast is featured within www.heartofdevon.com Jurassic Coast featured in national newspapers and magazines. Increase in visitors and spend in the area.
5.7	Establish a formal network of Tourist Information Centres (TIC's) within the Heart of Devon to develop best practice, new forms of income generation, co-ordinated cross selling and cross marketing and to keep TIC's informed of Heart of Devon promotional activity	HOD TIC's	Improve visitor services and promotion. TIC's hold up to date information and feature other areas within the Heart of Devon. TIC's work collectively to achieve economies of scale in bulk purchasing. Visitor numbers to TIC's increase.
5.8	Work with Visit Devon and the other Area Tourism Partnerships within Devon to ensure that Devon is featured in Visit England promotional campaigns which will enable Devon to gain exposure through national and international promotional campaigns	HODTP Visit South Devon Dartmoor North Devon + Plymouth English Riviera	Devon and thereby Heart of Devon featured in national and international promotional campaigns co-ordinated by Visit England. Website hits to www.heartofdevon.com increase.

		Visit Devon PR agency Visit England HOD members PR agency	Devon is featured in national magazines and newspapers.
5.9	Increase the online presence of Heart of Devon, and destinations within, within other official and non-official tourism websites	Visit Devon HOD members PR agency	Information on the Heart of Devon features prominently on other tourism regional and national websites. The awareness of the 'Heart of Devon' increases. Website hits and page views on www.heartofdevon.com increase. Visitor numbers increase.
5.10	Develop a new business tourism website (www.conferencedevon.com) and marketing campaign promoting conferencing within Exeter and the Heart of Devon	HOD conference members Visit Devon PR agency	New website launched. All Heart of Devon conference members featured on the new website. Increase in conferences and meetings held within the Heart of Devon. Increase in visitor numbers and spend. Business tourism/conference campaign implemented. Additional conference business generated.
5.11	Develop and implement a group marketing campaign promoting Exeter and the Heart of Devon to group organisers	HOD group related members Visit Devon PR agency	Increase in the amount or groups visiting the Heart of Devon. Increase in visitor numbers and spend from additional groups, tours and visits. Group campaign implemented.

5.12	Develop and implement a consumer marketing campaign promoting Exeter and the Heart of Devon, taking into account previous research, targeting Secure Families, Flourishing Families, Affluent Greys and Educated Urbanites	HOD members Visit Devon PR agency	3 themed marketing campaigns launched each year to promote Heart of Devon nationally. Increase in visitors and spend to Heart of Devon. Increase in website hits to www.heartofdevon.com
5.13	Work with Visit Devon, Visit Cornwall and the 5 other Area Tourism Partnerships within Devon to promote the West Country overseas	PR agency Visit Devon Visit Cornwall Visit South Devon Dartmoor North Devon + Plymouth English Riviera HOD members	Increase in website hits to www.heartofdevon.com Increase in overseas visitors and spend to the Heart of Devon. Increase in visitor numbers to TIC's and attractions.
5.14	Work with the Board of Directors of the Heart of Devon to ensure a sustainable financial footing for the Tourism Partnership	HOD members HOD board directors	Heart of Devon becomes more self financing to deliver marketing activity and membership benefits.
5.15	Develop an attractive range of membership benefits for new and existing members of Heart of Devon	HOD members HOD board directors Visit South Devon Dartmoor North Devon + Plymouth English Riviera Visit Devon	Membership to Heart of Devon grows by 10%. Increase in income to Heart of Devon. Business performance and development activities increased.
5.16	Work with the 5 other Area Tourism Partnerships within Devon on	Visit South Devon	Joint projects developed county wide to

	joint projects to achieve economies of scale – for example website procurement	Dartmoor North Devon + Plymouth English Riviera Visit Devon HOD members	achieve economies of scale to the benefit of all ATP's within Devon, with the following investigated: • PR • Website procurement • Advertising • Print • Photography • Business development
5.17	Promote the Heart of Devon through the use of social networking, viral marketing, smartphone apps and new technologies	Website hosting company PR agency	Increased awareness of the Heart of Devon to a younger audience. Increased attendance at visitor attractions and events within the Heart of Devon. Higher occupancy for Heart of Devon members.
5.18	Review the Heart of Devon accommodation inspection scheme to ensure businesses are safe, clean and legal, and to improve the quality of accommodation within the Heart of Devon. Scheme to relate to other existing accommodation inspection schemes throughout Devon	Visit South Devon Dartmoor North Devon + Plymouth English Riviera Visit Devon HOD members	Accommodation inspection scheme is less confusing. Less complaints from visitors. Increase in quality businesses and thereby the image of the sector within the Heart of Devon.
5.19	Research and develop activity/adventure tourism to increase the awareness of what there is to see and do within the Heart of Devon	HOD members Visit Devon Activity providers EDAONB	Increase in activity/adventure tourism to Heart of Devon. Information on activity/adventure tourism on www.visitdevon.co.uk and

		BHAONB MDDC EDDC Jurassic Coast team	www.heartofdevon.com increases. Increase in visitors and spend to Heart of Devon.

Abbreviations from action plan:

DCC	Devon County Council	MDDC	Mid Devon District Council
ED	Exeter City Council, Economic Development	EDDC	East Devon District Council
E&HODHRA	Exeter & the Heart of Devon Hotels & Restaurant Association	RAMM	Royal Albert Memorial Museum
EVIT	Exeter Visitor Information & Tickets	HOSWLEP	Heart of the South West Local Enterprise Partnership
SWCP	South West Coast Path	DWT	Devon Wildlife Trust
EDAONB	East Devon Area of Outstanding Natural Beauty	HODTP	Heart of Devon Tourism Partnership
BHAONB	Blackdown Hills Area of Outstanding Natural Beauty	SWTA	South West Tourism Alliance
E&HODESB	Exeter & the Heart of Devon Employment & Skills Board		

11.0 PERFORMANCE INDICATORS

11.1 The following are the current range of performance indicators. Early actions will be to review these to performance indicators to measure the outcome of the Visitor Strategy, improving services to customers and measuring economic impact.

<table>
<tr><th>Tourism Performance Indicators</th><th>2005</th><th>2006</th><th>2007</th><th>2008</th><th>2009</th><th>2010</th></tr>
<tr><td>Number of visitors to the Tourist Information Centre</td><td>87,995</td><td>72,899</td><td>74,800</td><td>106,234</td><td>79,618</td><td>76,530</td></tr>
<tr><td>Number of accommodation bookings made in the Tourist Information Centre</td><td>758</td><td>648</td><td>615</td><td>428</td><td>413</td><td>430</td></tr>
<tr><td>Number of others users of the Tourist Information Centre (tel, fax & email)</td><td>23,082</td><td>28,817</td><td>26,924</td><td>40,471</td><td>44,445</td><td>40,719</td></tr>
<tr><td>Number of visitors on a Red Coat Guided Tour</td><td>12,912</td><td>14,617</td><td>18,114</td><td>17,204</td><td>16,125</td><td>15,221</td></tr>
<tr><td>Number of visitors to the Quay House Visitor Centre</td><td>23,471</td><td>26,048</td><td>24,561</td><td>26,123</td><td>25,060</td><td>23,579</td></tr>
<tr><td>Number of visitors to the Underground Passages</td><td>18,459</td><td>Closed</td><td>4,753</td><td>19,863</td><td>18,896</td><td>19,517</td></tr>
<tr><td>Number of visitors to RAMM</td><td>233,408</td><td>247,000</td><td>192,025</td><td>Closed</td><td>Closed</td><td>Closed</td></tr>
<tr><td>Number of visitors to Exeter Cathedral</td><td>187,000</td><td>142,000</td><td>170,000</td><td>131,741</td><td>109,778</td><td>108,869</td></tr>
<tr><td>Number of group bookings made through the Tourism Unit</td><td>334</td><td>363</td><td>445</td><td>500</td><td>486</td><td>425</td></tr>
<tr><td>Number of unique visitors to City Council website www.exeter.gov.uk/visiting</td><td>33,087</td><td>30,312</td><td>Not know</td><td>Not known</td><td>Not known</td><td>196,456 (May-Dec)</td></tr>
<tr><td>Number of unique visitors to Tourism Partnership website www.heartofdevon.com</td><td>24,107</td><td>28,596</td><td>40,508</td><td>42,258</td><td>134,206</td><td>145,049</td></tr>
<tr><td rowspan="2">Number of accommodation bookings made through tourism website (start 2011)</td><td>n/a</td><td>n/a</td><td>n/a</td><td>n/a</td><td>n/a</td><td>n/a</td></tr>
<tr><td colspan="6">This data is being collected from summer 2011 onwards.</td></tr>
<tr><td rowspan="2">Value of accommodation bookings made through tourism website (start 2011)</td><td>n/a</td><td>n/a</td><td>n/a</td><td>n/a</td><td>n/a</td><td>n/a</td></tr>
<tr><td colspan="6">This data is being collected from summer 2011 onwards.</td></tr>
</table>

12.0 BIBLIOGRAPHY

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13.0 APPENDICES

13.1 NATIONAL, REGIONAL AND SUB-REGIONAL ORGANISATIONS

Visit England

13.2 VisitEngland is the country's national tourist board, it's primary role is to grow the value of tourism by working in partnership with the industry. VisitEngland launched the first national tourism strategy for England in ten years, "England: A Strategic Framework for Tourism 2010-2020". The strategy is intended to be a blueprint for growth and aims to maximise tourism's contribution to the economy, employment and quality of life.

13.3 Work undertaken by VisitEngland is broken down into four key areas:

- *Research and insights* – providing data, intelligence and analysis to the industry and government, and industry communications.
- *Integrated marketing* – develop promotional campaigns working with both the commercial and public sector, including TV, press and digital promotions.
- *Business support* – implementation of national quality standards, modernisation of visitor information and championing the visitor experience.
- *Partnerships* – working with a range of partners throughout the country to ensure successful delivery of the Strategic Framework and forging national commercial partnerships to optimise routes to market.

13.4 Where possible, the Heart of Devon Tourism Partnership will work in conjunction with Visit England in the promotion of the area. Our primary aim is to ensure data on www.enjoyengland.com is correct, relevant and inspires people to visit this area.

Tourism Alliance

13.5 Established in 2001 the Tourism Alliance, with the support of the CBI and the Secretary of State for Culture, Media and Sport, comprises of almost 50 tourism industry organisations that together represent some 200,000 businesses of all sizes throughout the United Kingdom.

13.6 The main purpose of the Tourism Alliance is to lobby government both in the UK and Brussels on the key strategic issues facing the industry. Other areas of activity include, identifying and developing policies and strategies to raise standards and promote quality within the industry and working with and lobbying government on all key issues relevant to the growth and development of tourism and its contribution to the economy.

13.7 Working with the Heart of Devon Tourism Partnership, and other Area Tourism Partnerships within Devon, we will work with the Tourism Alliance to raise the profile of the industry and consult with members on proposed changes to legislation affecting businesses.

South West Tourism / South West Tourism Alliance

13.8 South West Tourism was the regional tourist board for the South West and was funded by the South West Regional Development Agency to deliver its strategic statutory remit for tourism. Due to the changes in Central Government the South West RDA is being abolished and funding ceased to South West Tourism as of 31 March 2011.

13.9 As a result of the demise of South West Tourism there was a call for a regional tourism body from leading membership organisations, business groups and iconic businesses within the South West, and the South West Tourism Alliance (SWTA) was formed.

13.10 SWTA is intended to provide a shared voice for the tourism industry and the collection of data and intelligence. It is also to ensure that individual membership organisations work together to maximise economies of scale. The overriding principle of the Alliance is to support the industry and to improve the visitor experience in a cost effective and sustainable manner. The objectives are:

1. To represent, advocate and champion tourism in the South West and be a voice for its tourism industry;
2. To guide sustainable and balanced development of the visitor economy;
3. To collect data and provide intelligence to enable the competitive performance of the industry.

13.11 Exeter City Council as well as The Heart of Devon Tourism Partnership will work with the South West Tourism Alliance in delivering its objectives.

Heart of the South West Local Enterprise Partnership

13.12 The Local Enterprise Partnership which covers Exeter and the Heart of Devon was formed in spring 2011 under the leadership of the private sector and supported by all local authorities within the catchment area. The priorities for the partnership include job creation and business expansion, developing skills and boosting wages as well as creating the right conditions for economic growth.

13.13 The board of directors will lead on delivering the priorities of the Local Enterprise Partnership. The Heart of Devon Tourism Partnership will liaise with these board directors on a regular basis to ensure that tourism is at the forefront of priorities and actions delivered by the Heart of the South West LEP.

13.14 The following priority areas and actions of the LEP will have a direct impact on the tourism/visitor industry within Exeter and the Heart of Devon.

13.14.1 **Job creation:**

- Secure growth in our key urban centres and facilitate job creation across the heart of the South West, ensuring that market towns and rural areas are closely linked to urban growth and also economically successful in their own right.
- Provide support to strong sectors across the area such as tourism, food and drink, and land-based industries to grow employment opportunities through improving business profitability and productivity.
- Create the conditions for high levels of business start-ups and increase the numbers of jobs in expanding SMEs

13.14.2 **Productivity:**

- Coordinate and secure improvements to infrastructure, including superfast broadband and electrification of our rail network, key road improvements and housing, which underpins the success and prosperity of our businesses and communities

13.14.3 **Earning:**

- Achieve higher levels of earnings by improving skills and educational attainment levels, giving individuals across all our communities more choice and access to a wider range of employment opportunities

Visit Devon

13.15 The county wide Destination Management Organisation for Devon – Visit Devon – has gone through a period of change over the previous two years, primarily due to changes in funding and staffing. The six Area Tourism Partnerships within Devon (Heart of Devon, North Devon Plus, English Riviera, Dartmoor, Plymouth and Visit South Devon) along with Visit Devon, will continue to work collaboratively to promote Devon as a great place to visit, for an overnight stay or day visit – under the banner of Visit Devon.

13.16 Visit Devon will act as the voice of the tourism/visitor industry in Devon with the aim of increasing the number of visitors to Devon by promoting the county as a year-round destination for business or leisure. Any marketing activity will promote the Devon website - www.visitdevon.co.uk

13.17 Work undertaken will include:

- **Themed marketing campaigns** – a number of high impact themed campaigns to promote Devon at the highest level, including regionally, nationally and internationally.
- **PR** – a programme of weekly press release distribution, in conjunction with a specialist PR agency, to influence regional, national and international journalists to visit and feature Devon.

- **Website promotion** – work is undertaken, in conjunction with a specialised search engine optimisation company, to increase the amount of website traffic to www.visitdevon.co.uk

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY
8 SEPTEMBER 2011

CITY CENTRE BUSINESS IMPROVEMENT DISTRICT

1. PURPOSE

1.1 To inform Members of the outcome of the ballot towards establishing the proposed Business Improvement District (BID)

1.2 To seek Member's views on whether the City Council should support work towards a second ballot.

2. BACKGROUND

2.1 Scrutiny Committee and Executive received a report in June 2011 on the detailed priorities and projects contained in the proposal document for establishing a Business Improvement District in the city centre. Executive confirmed its support for the proposals and authorised the Portfolio Holder for Economy and Tourism to cast the City Council votes in favour of establishing the BID.

2.2 A BID is an area within which local businesses agree, through a local ballot, to levy a supplementary rate in addition to their business rates to support a programme of activities and improvements in that area. Officers have been working with a steering group made up of city centre businesses, including representatives of the Chamber of Commerce and Industry and a cross section of the retail and professional business community, to prepare the proposal document and to try to gain sufficient support to secure a positive vote to establish the BID.

2.3 The aims of the proposed city centre BID were to:-

- increase new and repeat customers – promoting the area, its attractions and events
- improve the visitor and resident experience – making the area brighter, cleaner and safer
- provide a significant financial resource to make a real difference to business success, protect and create employment, and support projects targeted at specific areas of the city centre
- introduce a positive brand and profile – involving pro-active promotion of development and investment opportunities
- help to attract and retain quality staff
- encourage and co-ordinate proactive strong businesses groupings around the city centre – to collaborate on key projects or address issues in their locality
- be fair and inclusive – allocating BID funds to benefit all businesses in the city centre
- act in a honest and transparent way – proposals would be decided by businesses, developed by businesses, delivered by businesses.

2.4 The specific services and projects contained in the proposed document/business plan were the result of extensive consultation and communication with the business community in the city. In the first year the priorities were to:-

- develop and implement a new City Centre marketing plan
- deliver a series of additional new events/festivals to attract visitors in peak periods
- deliver major improvements to Christmas lights across the city centre
- provide Area Based Grants to enable groups of businesses to carry out specific projects to enhance business success
- extend evening Park and Ride services to enable people to stay longer and assist staff travel
- enhance graffiti/fly-posting removal
- undertake additional planting/landscaping to provide visual and aesthetic benefits
- install two additional CCTV cameras – Musgrove Row and Northernhay Park
- enhance street power washing (outside of Princesshay and Guildhall areas)
- enhance street maintenance regime for footway repair and street furniture

2.5 The proposed levy of between 1- 1.5% of rateable value was intended to raise over £720,000 per year for five years to fund these and further projects to support city centre businesses/organisations and the employment that depends on their success.

3. BALLOT RESULT

3.1 The ballot was held from 24 June to 22nd July 2011, and undertaken by the Electoral Reform Society on behalf of the City Council. Of the 740 potential votes, 372 (50.2%) were cast, of which 180 were in favour (48.4% of votes cast), and 192 (51.6%) were against.

3.2 The voting was also measured by the total of the rateable values represented by each of the votes for and against the proposals. The 180 votes in favour amounted to £14,277,000 of rateable value (44.8%) compared with the £17,569,000 (55.2%) against. Both voting measures would have had to exceed 50% in favour for the BID proposal to go ahead.

3.3 The ballot was confidential but some information is available which indicates the following:-

- Many national retailers occupying large units did not vote. Some had indicated they would do so positively or were known to have done so on other BID votes in other locations

- Some organisations known to be supportive of the BID had more than one vote covering more than one premises, but only cast one vote.

- A number of businesses who indicated that they would vote and vote in favour did not in the end cast their vote.

4. NEXT STEPS

4.1 There does not appear to be one clear reason why businesses/organisations chose not to vote or to vote against the proposals. For some there is no doubt that the economic situation was a key factor. For others it may well be that the proposals did not excite or convince them. The outcome is however partly surprising in view of the growing number of existing new or repeat BIDs being established in the region.

4.2 The competitive challenges facing city centre businesses and the importance of maintaining the city's attractiveness for investment remain, and are all the more important to address in these difficult times. A considerable number of businesses and organisations did vote for the proposals, realising the contribution the additional funding could make to the success of the city centre. There appeared prior to the vote to be a higher number of potential votes in favour than the final result indicated.

4.3 The potential benefits to the city centre are covered by the aims of the BID as set out in 2.3 above, as previously agreed and supported by the Council, and are certainly still worth pursuing. It is proposed that discussions are held with the BID Steering Group to undertake the following:-

- Consult with the businesses/organisations in the proposed BID area to confirm or otherwise the suitability of the proposals and interest for a second ballot
- Review the effectiveness of the communication and engagement with businesses employed for the first voting round

5. RECOMMENDATION that:-

5.1 Members give their views on whether the City Council should support working with the business community to review the proposals for establishing a city centre Business Improvement District and promote a second ballot.

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 this report:
1. Report to Executive: 21 June 2011 City Centre Business Improvement District.

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY
8 SEPTEMBER 2011

DEVELOPMENT OF A PLACE MARKETING STRATEGY

1.0 PURPOSE OF REPORT

1.1 To seek Members views on a proposal to draft a Place Marketing Strategy.

2.0 BACKGROUND

2.1 Members received a report in June 2011 on the activities of the Economic Development Service in relation to the economic development strategy. The June report to Committee set out a number of actions for 2011-2012 including the activity to:

"Develop a marketing strategy for the city which will include identifying and reinforcing a distinctive brand identity for the city, differentiating it and securing the reputation as the second city in the South West only behind Bristol."

2.2 The city through its development programme and stated ambition is looking to build on its strength as the "regional capital" south west of Bristol. This is underpinned by its focus on infrastructure developments across the Exeter and East Devon New Growth Point and the increasing stature and research capability of the University of Exeter. This coupled with other science-based assets such as the Met Office supports the more recent promotion of Exeter as a city of science. Exeter's attraction as a place for successful businesses, investment, for employment and in which to live, will also continue to be founded on the city's substantial presence in the professional and business service sectors, the city's significant and growing retail offer and, its renowned quality of life.

2.3 Overall, to secure Exeter and the sub-region's future competitiveness, its strategic medium to long term priorities lie in maintaining a focus on investment in infrastructure, business support, encouraging organizations involved in knowledge based activities including research and development, and in the workforce.

2.4 Many cities/locations in the UK will have come to the conclusion that in anticipation of an economic upturn there is a need to be proactive in promoting themselves to secure investment and much needed growth. The competition for investment will be such that those locations with real, tangible opportunities, rather than those relying purely on their aspirations will be in the best position to capitalize on them.

2.4 A draft proposal to develop a city wide approach to marketing the city is attached for consideration.

3.0 DRAFT PLACE MARKETING STRATEGY

3.1 The Place Marketing Strategy will set out to reinforce Exeter's image and perception as the principal economy west of Bristol which has outperformed most locations across the UK for job creation, featuring in the top 2% for employment growth.

3.2 Investors, businesses and skilled workers will consider a number of characteristics of a location when assessing the merits of investing time or resources or moving or remaining there. However in an increasingly complex and competitive world, many people and businesses are digitally or otherwise connected and often overloaded with information. They have little time to pay attention to information and messages which do not come over persuasively and consistently. It is difficult for a place to stand out without proactive effort.

3.3 Importantly, to be in the rankings, the city needs to be perceived and establish its reputation as having an environment that stimulates development opportunities, a diverse and dynamic business structure, a knowledge base that is still growing, underpinning commercial growth and a policy environment which provides leadership, guidance and particularly supporting and welcome investment.

3.4 The draft document proposes the following aim and objectives which are for debate, amendment and agreement as necessary to provide the focus for effective and collective effort:-

Aim

"To establish and reinforce Exeter's reputation as the regional capital and the principal economy south west of Bristol for investment, successful businesses and key workers"

Objectives

- secure commercial and public sector investment to reinforce Exeter's position as one of the main "power houses" of the South West economy
- attract new employers and particularly more knowledge based businesses and entrepreneurs into the city's economy
- reinforce the city's reputation for having a leading combination of retail, heritage and cultural experiences
- attract and retain skilled workers

3.5 To achieve these objectives, the document has proposed a series of actions, based around the formation of a Marketing Alliance involving the City Council working proactively and hand in hand with other key organisations in the city. The Alliance will work together to develop an agreed marketing strategy and drive and deliver a range of actions, each of which raises the city's profile and contributes toward Exeter being recognised as a place for investors, businesses and key workers and as such, the undisputed regional capital and principal economy south west of Bristol.

3.6 Members of the Marketing Alliance will be drawn from key partners and influencers who will formally commit to developing and implementing the strategy:-

- City Council and neighbouring local authorities
- The University of Exeter, Exeter College and Schools (State and Private)
- Business, cultural and environmental leaders
- Developers, commercial and retail agents
- The media

3.7 The initial actions proposed as set out in the action plan in the attached document include:

- to establish a Marketing Alliance to drive and co-ordinate a one city approach to promotion and marketing

- to review the current city branding approach, to determine and agree the range of key messages to project and to agree an appropriate core brand and the most effective strap line(s) based on achieving a sound and credible portrayal of the city's relevant strengths.
- to commit resources to produce and deliver a Communication Plan to be developed through shared activities including developing effective media relations, social networking and events, marketing and budgets
- to establish with partners across the city economy, effective PR at local, regional, national and international levels
- to develop, produce and maintain a city wide promotion and marketing website and social media campaign.
- to establish specific sector marketing groups from across the city economy to determine the benefits, opportunity and approach to raising the profile of each sector
- to establish a task and finish group to target and attract major national and international events to raise Exeter's profile and boost the city economy
- to establish a task and finish group to identify and test the feasibility of delivering an iconic project beneficial to the city economy

3.8 The Marketing Alliance will need to agree and adopt the Place Marketing Strategy and further develop the detailed content, proposed key characterisics of the brand and set out and coordinate its activities within a Communication Plan. The Communication Plan will set out a series of steps to achieve positive perceptions of the Exeter economy and will need, for example to:

- provide the basis for agreeing a "story" that differentiates the city and sets out the key messages to be used as the focus of promotional activity
- contain consistent and credible facts and statements that portray the city's assets, its appeal and the benefits of being here
- adopt a joined up approach to avoid gaps in promotion and avoid duplication of effort
- rely on the individual and collective commitment of local organisations to actively promote and market the city's brand and cultural assets as one voice
- be reviewed regularly and adjusted and updated as appropriate

4.0 CONSULTATION

4.1 The proposed approach needs to have the input and views of key organisations and individuals within the Exeter economy in order to shape, agree and obtain commitment to the development of the strategy.

4.2 An initial workshop will take place as the embryonic Marketing Alliance with relevant, experienced senior representatives from the University, business organisations and leading businesses to seek their views and suggestions about taking the process forward. If supported a working group will be set up from those who have agreed to be "lead" organisations to draw up the strategy in more detail. The consultation will seek to identify potential barriers to implementation and resources e.g. time, knowledge, staff and finances available. The draft strategy will be brought back to Scrutiny Committee Economy and Executive for comment and endorsement.

5.0 FINANCIAL IMPLICATIONS

5.1 There are no immediate financial implications arising from the report. Following consultation, Officers will brief Members and seek their views on co-financing recommended for the implementation of the Place Marketing Strategy.

6.0 RECOMMENDATION that

7.1 Members comment on the report

7.2 Officers consult on the Draft Place Marketing 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 this report:

1. 'Economic Development Update', Scrutiny Committee – Economy, 9 June 2011

Consultation Draft

Towards the development of a Place Marketing Strategy for Exeter

2012 – 2016

Contents

1 Executive Summary

1.1 Exeter is the principal economy west of Bristol and has in the last decade outperformed most locations across the UK for job creation, featuring in the top 2% for employment growth.

1.2 The UK Competitiveness Index confirmed that Exeter has seen the greatest improvement in competitiveness against all other UK locations. The city's local economy continues to attract investment, create new businesses, support and grow existing businesses and draw in high calibre employees. With significant planned economic and retail developments and increased availability of employment land, Exeter is in a strong market position to grow its economy further.

1.3 It is proposed that this Place Marketing Strategy has four objectives designed to reinforce Exeter's strong market position, to:

- secure commercial and public sector investment to reinforce Exeter's position as one of the main "power houses" of the South West economy
- attract new employers and particularly more knowledge-based businesses and entrepreneurs into the city's economy
- reinforce the city's reputation for having a leading combination of retail, heritage and cultural experiences
- attract and retain skilled workers

1.4 Investors, businesses, and workers are drawn to Exeter by the strength of, and confidence in, the local economy and its ability to create employment. Supporting this offer is the city's renowned quality of life and its geography as a place which is accessible, is on a comfortable scale and easy to move around. Such attributes are attractive to knowledge-based businesses and workers, and visitors and students alike.

1.5 However, quality of life alone is not the driver of economic development, prosperity and a sense of place. A city's sense of place, which can add to the attraction of a city is engendered principally by – the nature and quality of the physical and natural environment, the layers of history that are its story, the diversity, and character of its population and, the presence of well-known people and renowned organisations, products or services.

1.6 Investors, businesses, and skilled workers predominantly see cities through their perceptions of a number of characteristics when assessing the merits of investing time or resource, or moving or remaining there. However, in an increasingly complex and competitive world, many people, and businesses are digitally or otherwise connected and simultaneously overloaded with information. They have little time to pay attention. It is difficult for a place to stand out without proactive effort.

1.7 To stand out, it is vital that Exeter differentiates itself. Exeter needs to identify characteristics closely associated with the city that differentiate it from competitors. Crucially, whatever is done, said, and promoted about the city and its hinterland must be credible and mark it out as **the** place for investors, businesses, visitors, and students.

1.8 In terms of the city's characteristics, Exeter has an array of visible brand and cultural assets that potentially mark out the City's distinctive offer. For example, the University of Exeter, in the top 1% of the world's universities, is one, if not the most important visible brand asset. However, some assets are currently largely 'hidden' beneath people's general perception. For example, Exeter's top performing track record in job creation is currently a hidden brand asset.

1.9 Exeter could promote itself based on its brand and cultural assets. There is a strong story to tell. However, in the clamour to be heard, many locations might be perceived as being indistinguishable from other cities. Most other cities emphasise their location for quality of life. There are countless locations promoting, similar things and images to Exeter. It may not be easy to stand out. The question therefore arises, does Exeter need to identify and resource and deliver an iconic symbol or project that grabs and holds national and international attention and places the City at the forefront of people's minds, particularly investors, businesses and entrepreneurs?

1.10 In addition, to make the most of the city's offer, effective brand development is required. Like any other branded product or service, Exeter needs to consider how its assets can be used to drive and relate to the drivers of decision making and choice that influence how people might perceive the city as a place that will meet their needs.

1.11 Of primary consideration for investors, businesses and skilled workers is their desire for certainty regarding the strength of the local economy, its credibility as a profitable location and its ability as a good place for attracting and retaining skilled workers and developing careers. Providing these three groups with such confidence to locate themselves or invest in the Exeter Economy is the driver that most influences their decision making. Exeter can provide that certainty and confidence.

1.12 Exeter provides investors and businesses with the confidence of a strong local economy. The city has established a clear direction regarding its aspirations of where it intends go: the multi-million pound public and private sector investment partnership which is working well together within the Exeter and East Devon Growth Point, a 20 year major economic development programme, is indicative of the city's strength and the confidence in the area. The University of Exeter is going from strength to strength and is the 25th fastest growing organisation in the UK and within the top 100 across Europe. Flybe is expanding. John Lewis is opening a new store in 2012. This will position Exeter as the second largest retail catchment centre in the South West. The Science Park and City of Science initiatives illustrate Exeter's aspirations to grow more knowledge-based businesses in the area. Furthermore¸ the recent Exeter Chamber of Commerce and Industry's science and technology initiative with 100 local companies aims to promote the strengths of these business sectors.

1.13 With regard to the needs of employees, it is clear that Exeter is successful at creating jobs, providing the workforce with the confidence that the city is a good place to find employment. Between 2000 and 2009, the latest available figures, Exeter created 19,000 jobs, comparing favourably with much larger cities and employment locations, such as Cardiff, Edinburgh, and Belfast. Moreover, the Exeter and East Devon Growth Point projects the creation of a further 26,000 jobs by 2026, adding weight to Exeter's claim as a hub for job creation.

1.14 And in terms of high value employment, Exeter has the second highest concentration of knowledge-based services (KBS) within the South West, slightly behind and second only to Bristol.

1.15 Adding to these assertions and statements is Exeter's demonstrable ability to successfully support the most complex of relocations. The biggest example of which in the past 10 years was the city-wide effort and energy towards securing the relocation of and welcoming the Met Office, which is testimony to the city's capacity and determination to go that extra mile. Complementing this is a welcoming and on-going friendly networking environment, an important secondary consideration for investors and businesses. Underpinning these strengths is Exeter's reputation for an outstanding quality of life.

1.16 It can therefore be argued that Exeter has a range of credible and tangible assets that underpin the city brand. The promotional approaches used previously, 'Regional Capital', 'It's a capital city', and 'City of Science' have contributed to the success so far. However, against an increased level of promotional activity from other locations, it is appropriate to review and consider what approach is now required for the city's economy. Such an approach would need to promote a strong unifying brand and focus for enhancing and reinforcing as a positive perception of the city with the resources available. Resources are stretched and with more cities actively competing for inward investment, business growth and job creation, a shared and committed focused approach as one city is proposed in order to achieve the necessary impact.

1.17 It is not just about sharing and using the same city-wide logo and strap line. Exeter needs as many key local players as possible embracing the same core values and working together in a common direction in developing and promoting the city. It is about agreeing and sharing common messages, maximising the opportunity for visibility and reinforcing the brand. It is also about harnessing the collective enthusiasm and resources applied by many local organisations and individuals in the pursuit of promoting some positive aspect of the city and its environs.

1.18 It is recommended that a Marketing Alliance is formed with key partners and influencers who possess the right skills or have a vested interest in formally committing to developing and implementing the marketing strategy. The purpose will be to act together to drive and deliver a range of actions which effectively raise the city's profile. Such action will contribute towards Exeter being recognised as one of the places to note in the UK for investors, businesses and skilled workers and the undisputed principal economy west of Bristol. The actions are:-

- to establish a Marketing Alliance to drive and co-ordinate a one city approach to promotion and marketing

- to review the current city branding approach, to determine and agree the range of key messages to project and to agree an appropriate core brand and the most effective strap line(s) based on achieving a sound and credible portrayal of the city's relevant strengths.

- to commit resources to produce and deliver a Communication Plan to be developed through shared activities including developing effective media relations, social networking and events, marketing and budgets

- to establish with partners across the city economy, effective PR at local, regional, national and international levels

- to develop, produce and maintain a city wide promotion and marketing website and social media campaign.

- to establish specific sector marketing groups from across the city economy to determine the benefits, opportunity and approach to raising the profile of each sector

- to establish a task and finish group to target and attract major national and international events to raise Exeter's profile and boost the city economy

- to establish a task and finish group to identify and test the feasibility of delivering an iconic project beneficial to the city economy

2 Aim

2.1 The proposed aim of the strategy is:

"To establish and reinforce Exeter's reputation as the regional capital and principal economy south west of Bristol for investment, successful businesses and skilled workers"

3 Objectives

3.1 The principle objectives of the strategy are to:

- secure commercial and public sector investment to reinforce Exeter's position as one of the main "power houses" of the South West economy
- attract new employers and particularly more knowledge-based businesses and entrepreneurs into the city's economy
- reinforce the city's reputation for having a leading combination of retail, heritage and cultural experiences
- attract and retain skilled workers

4 Context in Brief

4.1 Exeter is at the geographic centre of the South West; the first city west of Bristol, is eight miles across and connected by close proximity to the M5/A303/A38. The city has two main railway lines, 8 stations and is a short 15-minute journey to Exeter's International Airport, which has links to over 50 international and UK destinations.

4.2 Exeter has a credible and enviable track record in attracting investment and successful businesses. The UK Index of Competitiveness 2010 states that the city which has seen the greatest improvement in competitiveness in recent years is Exeter. The city has a large economy; its GDP is some £3.6 billion per annum. The city is successful in attracting and retaining significant employers, and has been in the top 2% nationally for its rate of growth in job creation.

4.3 Exeter has a very good level of amenities which are attractive to residents, students, visitors, and businesses alike. This offer is enhanced by the extensive range of historical, cultural, heritage and outstanding natural coastal and rural environments within the city's surounding area that includes the council areas of East Devon, Teignbridge, and Mid Devon, known locally as Exeter and the Heart of Devon (EHOD).

4.4 The city has a reputation for an outstanding quality of life and is regularly voted first in national surveys. Features of Exeter's surrounding area add to this picture, which is made up of rural, market and coastal villages and towns, with easy access to a vast range of outdoor pursuits, the moors, and the sea. In addition, Exeter, within this setting, provides an eclectic mix of outdoor and indoor activities that holds many interests for people of different ages and lifestyles. Further information can be found within the appendices.

4.5 Exeter is a beacon of knowledge. The Times and the Times Higher Education World University Rankings position the University of Exeter, which has 18,000 students, 10^{th} in the UK, 74^{th} in Europe and 184^{th} in the world (in the top 1%). The University's ambition is to reach the top 100 in the world by 2015. Nearly 90% of its research is at internationally-recognised levels in science, the arts and humanities. These disciplines also feature in the five interdisciplinary research themes of the University's Science Strategy.

4.6 Knowledge-based businesses within Devon are concentrated within the city. Exeter together with its wider economic footprint is the focus for knowledge-based services across[1] the whole of Devon, accounting for 55 per cent of employment in the city in this sector. The city alone accounts for over 31 per cent of such employment in Devon. The value of these services lies in their ability to transfer useful knowledge from one organisation to another.

4.7 John Lewis will open a major store in Exeter in 2012 and this will increase the city's retail footprint, increasing its national ranking as the second largest retail catchment in the South West. The appendices contain additional information on Exeter's national retail rankings. This and large strategic developments which are in the pipeline, for example: Exeter's bus station development, Hill Barton Business Park and most recently the programme of development covered by the Exeter and East Devon Growth Point, place Exeter in a strong market position as the regional hub for investment, businesses and skilled workers. Through some £1billion of private and public sector investment, the Growth Point is forecast to create some 26,000 new jobs and to be a beacon of excellence in taking forward integrated and sustainable housing and employment development. A more detailed summary of the city's characteristics and strengths are given in Appendix 1.

5 City Place Marketing

5.1 The Place Marketing Strategy will define what needs to be done to attract investors, businesses and skilled workers to Exeter and sustain and consolidate the city's market position as the principal economy west of Bristol.

[1] Knowledge-based Services: legal, accountancy, veterinary, architectural, engineering, design, computer programming, consultancy, business and management consultancy and specialised research and development. Source: The Work Foundation (2011) 'Britain's Quiet Success Story - Business Services in the knowledge Economy'

The significance of a 'sense of place'

5.2 A city's sense of place is engendered principally by – the nature and quality of the physical and natural environment, the layers of history that are its story, the diversity, and character of its population, the presence of well-known people and renowned organisations, products or services.

5.3 Each city has a range of characteristics and assets that define how it is perceived and how it compares with other places by those that live, work, study and visit there. How well a city 'scores' in the minds of its various audiences will affect its ability to draw in investment, new businesses, skilled workers , visitors and students.

5.4 Importantly, to be in the rankings, the city needs to be seen and establish its reputation as having an environment that stimulates opportunities; a diverse and dynamic business structure, a knowledge base that is still growing and underpins commercial growth, and a policy environment which provides leadership, guidance, and particularly supports and welcomes investment.

5.5 When residents, students, media, investors, businesses, and visitors think of Exeter, what principally may come to mind? How far does Exeter's reputation extend? Exeter may be many things to many people, some may see it as a historic city, or a city that is a relaxed place for visitors, whilst some may see Exeter as it can be, as a dynamic, vibrant, and forward-thinking city.

5.6 Increasingly cities and their surroundings are competing for investment, business, visitors, and students on the appreciation of their quality of life assets. Therefore, Exeter must continue to pay attention to and improve those aspects of its space (its location), place (its distinctiveness), and environment (its natural assets) that are the foundations of its character.

5.7 The recently published consultative paper for Exeter, 'A City Centre Vision for a Green Capital' (June 2011) is the start of defining a long-term strategic and physical vision for the centre of the city. Importantly, the paper sets out a framework for taking forward the Exeter Vision, which has defined overarching themes and aspirations for the city. Visions generally precede development. The ingredients within the green capital vision may take some 10 – 20 years or more to achieve. And yet, by providing a clear physical definition for the use of Exeter's space and places, similar to the Exeter and East Devon Growth Point, it will help investors, businesses, and skilled workers, to know the direction of future development and provide them with confidence if they choose to invest in the city.

5.8 Fundamentally, however, knowing and meeting the core commercial and non-commercial needs of businesses and the people that own or manage, and work in them is crucial. In addition, cities that offer attractive lifestyles tend also to be a magnet for key knowledge-based workers and visitors.

5.9 Cities project images and messages about the locality. However, in an increasingly complex and competitive world, many people, and businesses are digitally or otherwise connected and simultaneously overloaded with information. They have little time to pay attention to the array of information assailing them. It is difficult for a place to stand out without proactive effort across a range of media.

5.10 It is essential that Exeter identifies characteristics closely associated with the city that differentiate it from competitors. Crucially, whatever is done, said, and promoted about the city and its surroundings must be credible and mark it out as the place for investors, businesses, skilled workers, students and visitors. This will form the picture, the basis of Exeter's story and contain its character, its offer, and messages to be conveyed to prospective customers that the city wants and needs to attract.

5.11 Such characteristics help to provide the city with a 'sense of place'. Exeter is a place where people and businesses want to be. Of fundamental importance is that people and businesses that may want to be here too, also talk positively about Exeter. It will be essential to secure proactive 'chatter' within and across the networks such as Facebook and Twitter which people now increasingly use to communicate.

6 Exeter's strengths, weaknesses, opportunities and threats (SWOT)

6.1 Exeter has an array of brand and cultural assets that potentially mark out the City's distinctive offer as a place for investors, businesses, skilled workers, students and visitors. A SWOT table has been produced to illustrate some of Exeter's most important visible brand and cultural assets. The city also has a range of "hidden" assets that are perhaps under recognised within the city and its surroundings and probably beneath the radar of people and businesses beyond Exeter and the Heart of Devon. These may need more promotion as a consequence.

6.2 Exeter could promote itself based on its brand and cultural assets. There is a strong story to tell. It is to some extent a distinctive offer. However, in the clamour to be heard many locations might be perceived as perhaps being indistinguishable from other cities. It may well indeed be difficult for Exeter to stand out from the crowd, particularly as most other cities emphasise their location for quality of life. There are countless locations in the UK and Europe, let alone on a wider scale, promoting, conceivably, similar things and images to Exeter, such as their University, people at work or study, people involved in outdoor pursuits, and highlighting how easy it is as a place to travel to and from.

6.3 It could be said that Exeter's weakness is its lack of a nationally recognised iconic symbol or project that grabs and holds national and international attention and places the city at the forefront of people's minds. Nevertheless, whatever is decided and agreed with partners, without effective promotion and marketing of Exeter's assets – visible and currently hidden – there is danger that Exeter will be passed by or beyond the radar of those investors, businesses, skilled employees and visitors the city may wish to attract. It may well be worth identifying a potential iconic symbol or it may even already exist but we haven't recognised it as such yet.

6.4 - ***SWOT Table***

Strengths		Weaknesses
Visible Brand Assets - *University of Exeter* - *The Met Office and Hadley Centre for Climate Change* - *Pennon Group, EDF Energy, Flybe* - *Princeshay and the City's expanding retail offer* - *Devon's quality of life image* - *Exeter International Airport* - *Exeter and East Devon Growth Point* - *Exeter's centrality within the South West and its connectivity to transport routes*	*Visible Cultural Assets* - *Exeter Cathedral, Exeter Quay, Exe Estuary, Exeter Underground Passages* - *Exeter Royal Albert Museum* - *City's heritage* - *Film location for German TV series based on novels by Rosamunde Pilcher* - *Proximity to – Dartmoor and Exmoor National Parks, Sea and Jurassic and Triassic Coastline, RSPB Nature Reserves, AONB* - *Exeter Rugby and Football Clubs, Exeter Racecourse and other sporting facilities* - *Exeter Phoenix, Northcott Theatre, Barnfield Theatre & Spacex and other venues*	*Brand Assets* - *No readily identifiable iconic or internationally known buildings, products or services* - *Clone city comment in press which still gets mentioned regularly*
Opportunities		**Threats**
Promote Hidden Brand Assets (beneath people's radar) e.g. - *University of Exeter's Science Strategy* - *Exeter City of Science initiative* - *Chamber EXIST initiative* - *Exeter's job creation track record & capability* - *Local knowledge-based services* - *New scientific and technology companies* - *Exeter College*	*Promote Hidden Cultural Assets* - *Develop Exeter as a hub for theatre or performing arts or live music in the region.* *Iconic Projects* - *identify and develop an iconic project for Exeter*	- *Promotion by County Council and/or Heart of South West LEP may overshadow or mask the real offer and strengths of Exeter and its surroundings by promoting a generic offer or messages that fail to recognise Exeter as a strong place for investment, business growth and employment.*

7 Defining Exeter's Brand

7.1 For effective brand development Exeter, like any other branded product or service, needs to consider how its brand and cultural assets relate to hard commercial considerations or sometimes, human emotional needs that drive decision making and influence how people might perceive it as a place to be.

7.2 *What do people look for?*

Listed below, to illustrate the point, are some suggested primary and secondary considerations of the different groups of people when looking at locations:

- Investors and Businesses

    - primary considerations – strong local economy, competitiveness of the location in cost, availability, accessibility, availability of skills
    - secondary considerations – reputation for local support, networking and friendliness and city's environment and green credentials

- Workers

    - primary considerations – vitality and potential as a new place to work, employment and career opportunities, location in the country
    - secondary considerations – strength of the local economy

- New residents

    - primary considerations – safe place to live, near family and friends
    - secondary considerations – its arts, culture and housing mix, its location

- Students
    - primary considerations – that graduates are amongst the most sought after by employers; the University enables students to achieve their highest academic potential
    - secondary considerations – the social scene, night-life and local term time employment opportunities

7.3 Exeter can provide investors and businesses with the confidence of it being a successful, relatively stable economy with identifiable and exciting opportunities for growth against an overall track record to help promote the climate of confidence and credibility required.

7.4 If is recommended that Exeter elects to focus on promoting and marketing itself on its track record, its assets and future growth plans as a city economy that offers 'certainty, confidence and credibility' to investors, businesses and skilled workers. The offer arising from Exeter and the Heart of Devon also meets secondary human emotional needs, which can contribute to confirming its sense of place, which is so important to raising and stimulating interest in the city.

What are Exeter's current brand approaches?

7.5 Whilst Exeter has a strong mix of brand assets that underpin a potential unified city brand, it is recommended that the existing approaches are further reviewed, 'Regional Capital', 'It's a capital city', and 'City of Science' have not fully harnessed the essence of Exeter's strengths and market position in a total city brand approach. There may well be a need for a new and revised brand approach for Exeter to better reflect the need to profile the city as a place offering 'certainty, confidence and credibility'.

- 'Regional Capital' – Exeter has been promoted as the regional capital west of Bristol as a bold statement of its ambition and to reflect the administrative reality and commercial importance of its location; however at a larger scale, Bristol is the undisputed main city. In addition, regional capital, whilst in some ways reflecting the nature of regional headquarters based in Exeter, does not sufficiently clearly portray the essence of the city's brand and cultural assets.

- 'It's a capital city' – reflects several aspects including Exeter's position as the capital of Devon, the quality of its assets that are reflective of a main urban centre, and also as a "capital" place to live. However, its emphasis is towards promoting imagery that reflects Exeter's quality of life and status. The term capital may also be perceived as old fashioned. As a consequence it does not brand the city as a place of growth or convey the city as progressive and therefore likely to be good for investors, businesses, and employment.

- 'City of Science' – has been a promotional initiative designed to raise awareness of Exeter's strengths and achievements in science and technology beyond its cream tea/cathedral image and its drive towards creating jobs and being a centre for recognised learning in the sciences. In its own right, reflecting some aspects of the city, it is a strong message and good story to tell about what Exeter provides and where it wants to go. Exeter Chamber's new initiative to promote the science and technology sector is likely to play a prominent role in taking this forward.

One city approach

7.6 There is now more than ever the need for an approach to branding and promotion that is based on collaboration and commitment to joint approaches to promoting and marketing the city. There are a number of organisations which have a vested interest in the city having a high profile, strong and positive image. In this current climate of more limited resources, there is an even greater imperative to pool effort and resources for maximum results.

7.7 There will be a need to gain consensus around the approach, nature and manifestation of the brand.

7.8 The ideal position will be when the city is effectively promoted and marketed and where both those here in the city and those beyond its hinterland share comparable positive perceptions of it.

7,9 For this to happen, it is essential that key partners and influencers who possess the right skills and approach from Exeter's economic, social, cultural, and environmental organisations work together and share a common focus and commitment to action. Exeter and its key partners should therefore establish a Marketing Alliance of willing and able individuals, firms, and organisations to give their time to commit resources and support the implementation of the Exeter Place Marketing Strategy. Potential partners should be drawn from:

- City and neighbouring local authorities
- The University of Exeter, Exeter College and Schools (State and Private)
- Leading businesses and business organisations, cultural and environmental leaders
- Developers operating in the city and commercial agents
- The media

7.10 This Marketing Alliance will need to agree and adopt this Strategy in order to be wholly involved in projecting the city and its key brand characteristics and messages. A Communication Plan will also be necessary, one that sets out a series of steps to achieve positive perceptions of the Exeter economy.

7.11 The Communication Plan will need to:

- set out the key messages to be used as the focus of promotional activity
- contain consistent and credible facts and statements that portray the city's assets, emotional appeal and the benefits of being here
- be driven and co-resourced by the Marketing Alliance
- adopt a joined up approach to avoid gaps in promotion and avoid duplication of effort
- establish a strategic focus on effective sector networking, media relations and active participation in significant profile events
- involve the development and delivery of workshops designed to work with key groups or organisations to understand the nature and value of their potential contribution and to engage them in promoting and marketing Exeter and its assets
- rely on the individual and collective commitment of local organisations to actively promote and market the city's brand and cultural assets with one voice
- be reviewed regularly and adjusted and updated as appropriate

7.12 It will be necessary to secure agreement of a range of key partners to the representation or vision of the city and its associated set of messages which are positive, attractive, unique, enduring and relevant to the many "audiences" to be targeted. Ideally it will be essential that this vision/desired perspective of the city is reinforced by consistent communication linking developments, investments, successes and other matters to the vision. It will also be necessary to underpin Exeter's story, statements, messages, and facts with a brand statement/strap line that:

- captures the essence of the city and its offer from the array of brand and cultural assets
- is memorable
- thought provoking
- has multi-dimensional meanings
  reflects the city's commercial strength and quality of life reputation

7,13 The following brand statement is suggested as an example to illustrate the point but others should also be suggested / considered in the process. The example conjures up many aspects that embody much about Exeter on the basis that it should appeal to investors, business, and employees, whilst also relating to other interests. The messages, distinguishing or selling points raised by this statement are briefly discussed below. Conversely, some may argue that a strap line should require no explanation or be overly complex if it is to be effective. A couple of other suggestions are provided, merely to encourage further creative thinking and invite comment.

"Exeter – we've earned our Capital reputation"

- The phrase, **we've earned our Capital reputation,** may be attractive to the target groups the city wants to attract, conjures up imagery of:

  - Exeter is a capital city and proud of its reputation
  - Exeter is industrious and a place for a return on investment
  - Exeter works hard to earn its capital and its reputation

- Exeter is a place where individuals, businesses and organisations work hard
- Exeter is a capital place to be – much like, but more of an active message than, the current one, 'It's a capital city'

Other examples for consideration might be the following but this aspect of the branding exercise will require more thought and alternative suggestions for joint consideration.:

- **"Exeter – growing capital"**

- **"Exeter – be part of its success"**

8 Action Plan

8.1 The implementation of the Strategy will need to ensure it relates to and complements other relevant strategies and plans to avoid duplication but also to achieve even greater impact by drawing on their activities. The appendices list some relevant documents. For example, The Exeter Visitor Strategy is focused on promoting the area as a visitor destination, will convey much about the city's cultural and environmental assets and the surrounding area, and is aimed at stimulating visitor expenditure. Actions under the Place Marketing Strategy will need to be coordinated and linked to the Visitor Strategy and will use its material as appropriate. It will be important that shared messages are agreed through the Marketing Alliance.

8.2 An initial Action Plan has been developed outlining the stages towards agreeing the Strategy and gaining the necessary wide support and commitment to its delivery. More detailed plans will follow.

INITIAL DRAFT ACTION PLAN – for discussion and development into a more precise timetabled programme of work. For clarity the objectives are repeated below. To:

- secure commercial and public sector investment to reinforce Exeter`s position as one of the main "power houses" of the South West economy
- attract new employers and particularly more knowledge based businesses and entrepreneurs into the city's economy
- reinforce the city's reputation for having a leading combination of retail, heritage and cultural experiences
- attract and retain skilled workers

	Action	Key Stages
1.	Establish a Marketing Alliance to drive and co-ordinate a one city approach to promotion and marketing	1. Secure commitment from key players across the private and public sector 2. Review the current city branding approach, determine and agree the range of key messages to project and agree an appropriate core brand and the most effective strap line(s) based on achieving a sound and credible portrayal of the city's relevant strengths. 3. Commit resources to produce and deliver a Communication Plan to be developed through shared activities including developing effective media relations, social networking and events, marketing and budgets 4. Establish with partners across the city economy, effective PR messaging on local, regional, national and international levels 5. involve the development and delivery of workshops designed to work with key groups or organisations to understand the nature and value of their potential contribution and to engage them in promoting and marketing Exeter and its assets 6. Grow the number of Exeter Ambassadors and work with them to produce an effective 'toolkit' to assist them in advocating the city as a place for investment, business and skilled workers 7. Draw on local sector knowledge of 'customer needs' and where necessary carry out surveys and research to ensure the city gets the right messages to the right people at the right time
2.	Develop, produce and maintain a city wide promotion and marketing website and social media campaign.	1. Agree principles of website's design and functionality to promote a one city approach incorporating cross marketing links on local partners' website, social media and other promotional media used. 2. Secure direct and in-kind funding commitment from local private and private sector partners 3. Produce a website design brief and procure local company to design, produce and maintain 4. Develop and deliver complementary promotional campaigns using other digital platforms in the social media and the use of emails to raise the profile of the site.

	Action	Key Stages
3.	Establish specific sector marketing groups from across the city economy to determine the benefits, opportunity and approach to raising the profile of each sector	1. Establish a programme of workshops / groups to determine the value of the approach 2. Determine priority actions for each sector by agreement to support and progress worthwhile initiatives 3. Identify and secure resources to progress the initiative
4.	Establish a task and finish group to target and attract major national and international events to raise Exeter's profile and boost the city economy	1. Scope role, terms of reference and agree a realistic end goal 2. Identify targets and interventions required 3. Produce a deliverable action plan 4. Agree proposals through the Marketing Alliance 5. Implement action plan
5.	Establish a task and finish group to identify and test the feasibility of delivering an Iconic Project beneficial to the city's image and economy	1. Secure commitment from relevant key organisations towards identifying potential projects 2. Scope role, terms of reference and agree a realistic end goal 3. Identify delivery partners and interventions required 4. Produce a deliverable action plan 5. Agree proposals through the Marketing Alliance

Appendix 1

	Exeter's strength in depth
	When considering locations within the UK, investors, businesses, knowledge-based workers, students and visitors will look at other locations within and beyond the South West.
	The Strategy used the Chartered Institute of Public Finance and Accountancy's (CIPFA) 'Nearest Neighbour' model and drew on the following indicators to identify the top 15 nearest Unitary Authorities and Non-Metropolitan Districts statistically close to the city by:
	- Population - % of population of working age - % unemployment - % daytime net inflow - % day visitors - Offices per 1,000 population - Shops per 1,000 population
	Bristol and Swindon are included in the top 15 nearest neighbours to Exeter using this method, as are Cambridge, Oxford, and Warwick. Plymouth, although not identified within the model, has been included, as it is the largest city by resident size in Devon.
	The results of the comparison illustrate Exeter's strength as a place for employment, for business growth and for investment.
	Exeter's strengths as a place for employment
	In summary Exeter:- - has the highest economically active workforce, standing at over 83%. - is in the top 2% nationally for its rate of growth in job creation, 7th highest in the UK, outperforming other cities. From 2000 – 2009 (the latest available data), Exeter created 19,000 additional jobs (+24.4%) In comparison, Oxford added 15,000 jobs, Warwick 11,000, Cambridge and Swindon 5,000 jobs each; Plymouth 4,000, whilst Bristol lost 1,000 jobs. Over this period, EHOD created an additional 34,000 jobs (+16.7%). - was 17th highest across the UK, in terms of total job growth nationally between 2000 and 2009, and compares favourably with much larger cities and employment locations, with for example, Cardiff (+24,000), Sheffield (+22,000) Edinburgh (+21,000), Manchester (+21,000) and Belfast (+20,000).

	- is a magnet for employment, outperforming the other cities for job density, which means it has the highest number of filled jobs divided by the number of people of working age resident in the city. The city is a powerhouse of employment opportunities relative to its size. For example, Exeter provides employment for some 13,000 less people than Plymouth, which has more than double Exeter's resident population. The city has the 10^{th} highest level of jobs density across all of the local authority areas within the UK. - has relatively higher proportions of employment than across England and Wales in the following broad industrial sectors: o Construction o Health o Motor Trades o Professional, Scientific and Technical Services o Property o Public Administration and Defence o Utilities
	Exeter strengths as a place for business growth The city:- - has the highest percentage of businesses with a turnover exceeding £1M (over 12%). - has the highest percentage of businesses (44%) that have been trading for 10 or more years. Exeter is a good place do business. - is a competitive city. The median annual gross pay for people employed in the city is £25,000. This is the same as Plymouth. Swindon, Bristol, and Warwick's median salaries are over £26,000, whilst Cambridge and Oxford respectively stand at around £28,500 and £29,000 per annum. - has the highest self-employment rate, standing at 8.5%. This coupled with high employment rates in the city, might suggest that Exeter is an entrepreneurial city.
	For high value employment, Exeter has the second highest concentration of knowledge based services (KBS) within the South West, slightly behind and second only to Bristol. The majority of Britain's economic growth comes from…ideas, knowledge and people's skills…and the businesses service sector has quietly driven the growth of the UK economy. This sector – which includes lawyers, engineering, science and technical activities, IT specialists, and consultants – has thrived because it creates value by providing the ideas and the knowledge that the British economy needs in order to grow (The Works Foundation 2011). Exeter's particular concentration of KBS employment in comparison to Bristol, Plymouth, Swindon, Cambridge, Oxford and Warwick and England and Wales, is in: o Legal activities o Engineering activities and related technical consultancy o Professional, Scientific and Technical activities

The table below summarises relevant demographic and knowledge based employment profiles.

Location	Population	Workforce 16 – 64 years	Total Employment	KBS Employment	KBS: % of Total Employment
Bristol	441,300	313,100	247,500	23,600	9.5%
Exeter	119,600	82,900	96,700	9,000	9.3%
Plymouth	258,700	173,800	109,800	5,400	4.9%
Swindon	201,800	133,500	121,100	9,200	7.6%
Cambridge	125,700	94,600	89,000	12,700	14.3%
Oxford	153,700	112,400	106,700	6,200	5.8%
Warwick	138,800	92,000	84,200	10,000	11.9%
EHOD	455,900	280,200	213,500	15,700	7.4%

Sources: ONS Annual Survey of Population, Mid Year Population Estimates 2010 and the Work Foundation (2011) 'Britain's Quiet Success Story - Business Services in the knowledge Economy'

In addition, the City of Science initiative illustrates Exeter's aspirations to grow more knowledge based businesses in the area. Furthermore¸ the recent Exeter Chamber of Commerce and Industry's science and technology initiative with 100 local companies aims to promote the strengths of these business sectors.

Exeter as a place for investment

The University of Exeter, is. one, if not the most important visible asset that at least annually raises the city's profile either through the Times, Guardian and Independent Newspaper rankings of UK universities or through the Times Higher Education World University rankings, all of which attract millions of readers. The University's investments since 2007 have positioned it in the top 100 fastest growing organisations in Europe and in the top 25 within the UK. In fact the University's trajectory anticipates that by 2013 they will be contributing over £480M of additional economic benefit to the economy.

The Exeter and East Devon Growth Point is currently utilising £100M of public sector investment, which will reach some £1billion with private sector investment and over its 20 year life is forecast to create over 26,000 jobs. Key projects include – Exeter Science Park (25 ha) and SkyPark (40ha), the new town Cranbrook, additional housing in the east of the city and communications infrastructure improvements planned for the area.

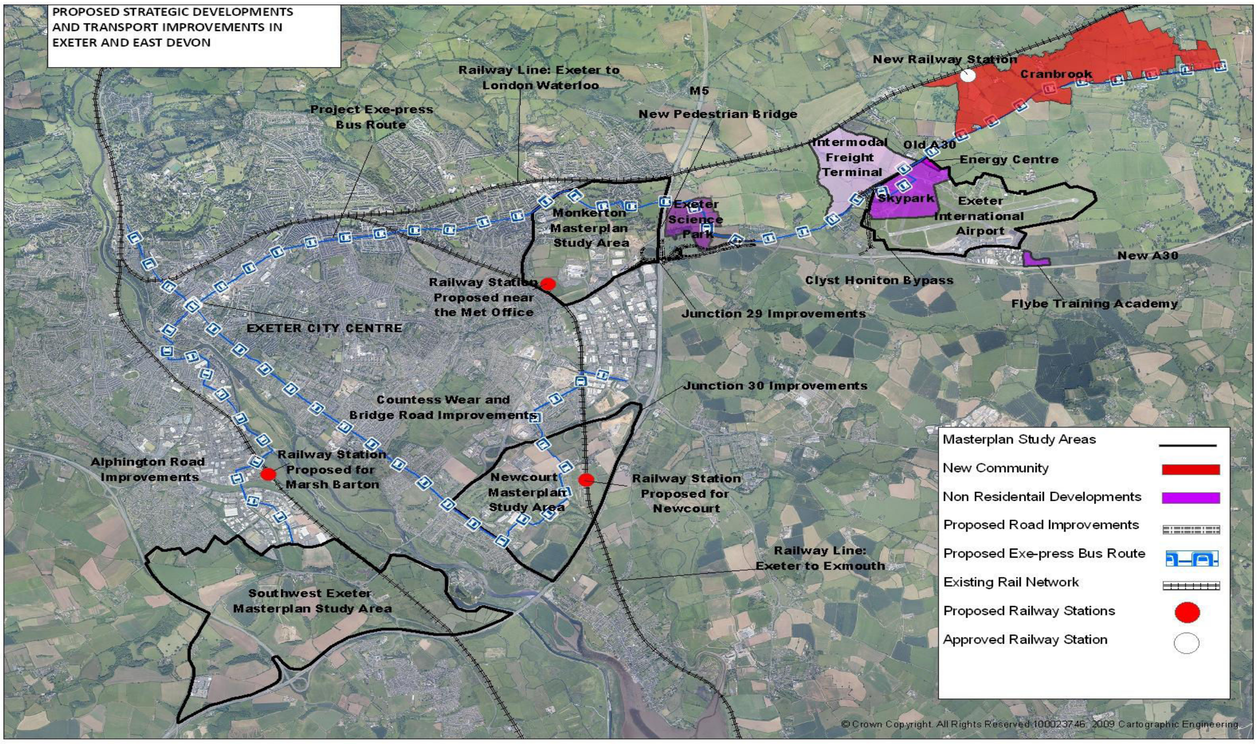
A plan is attached of the Growth Point and its key projects. Growth in employment is forecast to be spread across a number of key sectors as follows:

- *Growth Sectors*: these are established sectors which are anticipated to experience further growth due to Growth Point developments:
  - Business and Professional Services – 11,000+ new jobs
  - Retail and Hospitality – 3,500+ new jobs
  - Transportation and Logistics – 3,000+ new jobs
  - Food and Drink – 1,000+ new jobs
  - Construction and Building Services – 900+ new jobs

	- *Emerging Sectors*: these are currently under represented in employment & business terms, but forecast to grow due to Growth Point developments: ○ Advanced Engineering – 1,000+ new jobs ○ Bioscience and Health – 1,000+ new jobs ○ Low Carbon & Environmental Goods & Services – 1,000+ new jobs
	The largest development in terms of employment will be the Skypark business park, forecast to generate over 7,500 new jobs. Of these, the majority (over 5,000) will be in Business and Professional Services. The city centre is forecast to create almost half of the 3,700 new jobs in the Hospitality and Retail sectors. The development of Exeter Science Park will result in the majority of new jobs in the Emerging Sectors. The Emerging Sectors only account for approximately 13% of all jobs created by Growth Point developments.
	Summary
	Exeter has a strong economy. It is successful at creating jobs. The multi-million pound investment within the Exeter and East Devon Growth Point is indicative of the city's strength and the confidence in the area to invest in a 20 year major economic development programme. The University of Exeter is going from strength to strength and is the top 25th fastest growing organisation in the UK and within the top 100 across Europe. Flybe is expanding. John Lewis is opening a new store in 2012 placing Exeter as the second largest retail catchment centre in the South West with more city centre developments to come. Moreover, and building on the forward thinking nature of the city, the University of Exeter's Science Strategy, the development of the Science Park, the City of Science initiative and the Chamber's science and technology initiative, all point towards reinforcing the city's track record of attracting investment, encouraging business growth and creating jobs.

Appendix 2

Exeter and East Devon Growth Point



Appendix 3

Quality of life

The following examples, most of which are within 30 minutes of Exeter, highlight some of the aspects that contribute to the city's undoubted reputation as offering an enviable location and quality of life:

- 7 areas of outstanding natural beauty including 365 square miles of Dartmoor National Park, 77 square miles of Exmoor National Park and the Jurassic/Triassic Coastline designated England's first natural World Heritage site
- 5 Valley parks in the city including a Devon Wildlife Trust Sanctuary and Nature Reserve
- Woodland and 4 RSPB Nature Reserves of international importance
- Exeter Cathedral
- Exeter Quay
- Exeter Underground Passages
- Exe Estuary (water sports available - sailing, wind surfing, water skiing, jet skiing, diving, fishing, canoeing)
- In the region of 25 National Trust Properties to visit in Devon with 11 in Exeter and some 14 English Heritage sites
- More than 50 attractions including animal parks, adventure parks, museums, galleries and theatres, river cruises, castles, waterfalls and gardens
- 289 miles of heritage coastline (shingle and sandy beaches, limestone and red sand stone cliffs) totalling 67 beaches
- Devon has 36 public parks and gardens
- Dozens of pubs, restaurants, night-clubs and places to meet with live music in the City
- Annually over 150 arts and cultural events ranging from an animation and film festival, walking festival, music and community festivals, cycling events, art exhibitions, outdoor theatre, comedy and heritage and garden open days and a growing mix of fringe festival events and theatre
- A complete range of indoor and outdoor leisure and sporting pursuits: football, rugby, cricket, tennis, squash, badminton, swimming, aerobics, athletics, golf (+ driving range), horse riding, walking, bowls, bowling, martial arts, yoga, basketball, volley ball, table tennis, netball, canoeing, rowing sailing, angling, bridge and a dry ski slope
- Leisure Centres including a golf course, international standard athletics stadium, 3 swimming pools and an indoor bowls centre
- 60 Golf courses in Devon, 30 of which are within an easy drive of the City and 3 of national standard
- Over 1,000 miles of public footpaths, including 15 long distance routes such as the Two Moors Way, the South West Coast Path and the Green Circle Walk
- On and Off road cycling

- 3 Theatres, 3 cinemas & 10-pin bowling
- Pop and Rock concerts: Lemon Grove / Great Hall on University campus; The Corn Exchange; Powderham Castle and Killerton in summer months; occasional events at WestPoint
- Some 17 choirs including the Exeter Philharmonic Choir and the Exeter Festival Chorus
- Around 5 Local markets including a weekly Farmers' Market

Appendix 4

CACI 2010 Retail Footprint – Top 50 Centres in Great Britain

The top ranking location for retail in 2010 was London – West End at £3,170M, Birmingham ranked at number 3 at £2,430M. Cribbs Causeway shopping mall, near Bristol, ranked at number 38 at £610M. It would seem logical for the purposes of this paper to amalgamate the retail expenditure for Bristol and Cribbs Causeway because of their proximity to one another. This results in expenditure of £1,660M, far exceeding Norwich and would place Bristol as the 7th largest retail footprint in Great Britain. In 2012, John Lewis opens a major store in Exeter. This will increase the city's retail footprint. Its national ranking will improve, taking Exeter above Plymouth to become the second largest retail offer in the South West.

City	National Rank	Expenditure £ millions
Norwich	10	£1,180M
Bristol	13	£1,050M
Plymouth	27	£780M
Exeter	31	£740M
Ipswich	35	£640M
York	36	£640M
Oxford	41	£610M
Cambridge	39	£600M
Warwick	Does not feature in the rankings, it is however approximately 26 miles from Birmingham.	-

Other South West Retail Centres within the CACI 2010 Retail Footprint

City	National Rank	Expenditure £ millions
Bath	-	£550M
Taunton	-	£370M
Bournemouth	-	£340M
Swindon	-	£340M

Appendix 5

Relevant strategies and plans:

- Exeter Vision
- Exeter and Heart of Devon Growth Board
- Exeter and Heart of Devon Employment and Skills Board
- Exeter City Council Economic Development, Tourism, Arts and Media, Green Capital City Centre and Climate Change strategies
- Local Development Frameworks and Core Strategies
- Local Investment Plan for the Exe Authorities Area
- Exeter and East Devon Growth Point Delivery Plan
- Exeter City of Science and University of Exeter's Science Strategy
- Exeter Science Park Business and Marketing Plan
- Devon's Inward Investment Strategy

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE - ECONOMY
8 SEPTEMBER 2011

TRANSPORT INITIATIVES AND ISSUES - UPDATE

1 PURPOSE OF REPORT

1.1 This report is to update Members in relation to transport initiatives and issues affecting Exeter. In doing so, it also acts as a progress report in relation to the paper presented to this Committee on 21 January 2010 and Executive on 9 February 2010, entitled "Transportation Strategy: Measures to reduce carbon emissions / proposed City Council input to DCC Local Transport Plan 2011-16", which formed part of a suite of papers in relation to reducing carbon emissions in Exeter. In this report, the annotation "**KM**" against a topic means that it was identified as a Key Measure in those papers.

2 BACKGROUND

2.1 Responsibility for transport rests with numerous organisations, including the Department for Transport (DfT), Devon County Council (DCC) as Local Transport Authority, and private operators like First Great Western and Stagecoach who run the trains and buses.

2.2 Exeter City Council is involved in transport issues in a number of ways:-

(a) As local planning authority, we plan the location of development in relation to transport networks. DCC have produced a body of evidence to support our Core Strategy at its recent Examination in Public, and our own spatial planning policies have informed DCC's latest Local Transport Plan. A product of this collaboration is the Devon Metro proposals **(KM)**, discussed below at paragraph 3.2, whereby it is proposed to serve Exeter's new development areas by an improved rail system. It is also proposed to design bus priority into the road layout for the Monkerton development area, to enable a frequent and reliable service to be able to operate between the city centre, Monkerton, the Science Park and Cranbrook **(KM)**.

(b) Also as local planning authority, we endeavour to ensure that new development is designed to maximise use of sustainable travel modes. A Sustainable Transport Supplementary Planning Document (SPD) is being prepared, to ensure that new developments cater properly for sustainable modes of travel, and to set out a consistent approach to seeking contributions from developers towards the facilities needed to serve their developments.

(c) We provide some transport infrastructure, notably facilities for cycling and walking, and off-street car parks.

(d) We respond to consultations from government and elsewhere (see paragraph 3.4).

(e) Other specific transport-related functions, outside the scope of this report, are the enforcement of on-street parking under an agency with DCC, and the licensing of taxis and private hire vehicles.

2.3 It will be seen from the content of this report that in many cases Exeter City Council's involvement in projects is as more than a mere consultee. Much of our input into transport issues is in influencing decisions made by DCC and others to ensure that Exeter's interests are promoted.

3 RAIL

3.1 At its meeting on 10 March 2010, this Committee received a report from a Task and Finish Group set up to consider rail issues. It resolved to endorse DCC's Devon Metro proposals, and to support the principle of working with DCC and other stakeholders to lobby for rail improvements.

3.2 The Devon Metro proposals **(KM)** include new stations at Newcourt and Marsh Barton and, in the longer term, Monkerton/Hill Barton. DCC has entered into a Memorandum of Understanding with First Great Western and Network Rail to develop these proposals, and is currently working through the rail industry's approval process for the new stations. First Great Western's timetable planners have also been working on how to accommodate additional stations in the timetable. Further afield, a detailed planning application is being prepared in respect of Cranbrook station with a view to construction commencing in 2012/13. A summary of the Devon Metro proposals is included as Appendix 1.

3.3 Meanwhile, First Great Western has announced that it will not be exercising the option to extend its franchise, meaning that it will end in 2013. TravelWatch South West is co-ordinating a region-wide strategy to ensure that the new franchise, expected to be for about fifteen years, delivers high quality inter-city services as well as reflecting local schemes such as Devon Metro. Electrification of the main line out of Paddington has now been confirmed as far as Bristol and Cardiff, but Ministers continue to talk of "progressive" electrification and we will work with other stakeholders to press for Exeter to be included in a subsequent phase.

3.4 To this end, officers are continuing to press the case for improvements to Exeter's rail system, including responding to consultations whenever there is a legitimate point to be made. For example, both the DfT and Transport Select Committee have consulted on the subject of High Speed Rail, to which we have responded, pointing out that although the merits of a high speed line to the Midlands and North are for others to debate, if it is pursued it must not be at the expense of rail in other parts of the country. This was picked up by the press, resulting in considerable support for Exeter's point of view.

3.5 More recently, we have responded to a consultation about rolling stock strategy. This was a valuable opportunity to express concern about the low growth forecasts contained in the strategy, which are likely to exacerbate the current shortage of diesel trains for local services, as recognised by the Task and Finish Group. We have also pointed out some of the London-centric attitudes in the document which fails to recognise that Exeter, Plymouth and even Bristol have any suburban lines (the Exmouth line, for example, is classed as "rural"). That said, there is much of value in the document's recommendations, notably that designs should be standardised and procurement "smoothed" to result in a steady supply of "go anywhere" rolling stock, at lower cost to the industry.

3.6 The Council is currently working with DCC, Network Rail and First Great Western on plans to improve the forecourt at Exeter Central station **(KM)**. The rail industry is currently investing £750,000 in this station under the National Stations Improvement Programme, including relocation of the booking hall to a more prominent position in the centre of the crescent of shops. A further £580,000 is being invested by the industry in St David's station **(KM)**. A sum was allocated to Central station forecourt in a previous ECC capital programme, and a new bid has now been submitted for a contribution to improvements, since it appears that they could proceed in 2012/13 following completion of works to the building.

4 OTHER PUBLIC TRANSPORT DEVELOPMENTS

4.1 Exeter's city bus services received a boost earlier this year, with the investment by Stagecoach in a fleet of 36 brand new buses. These have given the local network a more modern image and meet the very latest emissions standards **(KM)**, and represent a welcome vote of confidence in the city by the company.

4.2 Patronage on Park and Ride services continues to grow, and a Sunday service from Honiton Road was introduced in January. DCC are carrying out more work on their proposals for a new site at Alphington interchange, which were supported by this Committee in 2008 as part of a package of measures to improve the Alphington Road corridor **(KM)**, but have proved contentious during the planning process.

4.3 Smart ticketing **(KM)** in Exeter is about to become a reality, with Stagecoach expecting to commence reading concessionary passes electronically during September (these passes are already in the form of smartcards). They propose subsequently to extend the concept to some of their own products, like Megarider season tickets,. Extension of the scheme to concessionary passes on all bus services in the South West is expected at the end of the year.

4.4 The concept will be developed further thanks to a successful bid to the Government's Local Sustainable Transport Fund, by a partnership of Local Transport Authorities and bus operators across the South West. The intention is to make public transport more attractive, and to open up the possibility of tailoring specific products to groups of individuals, for example to make it easier for them to access employment or training. Smart ticketing is not limited to buses, as all new rail franchises are including a requirement to adopt this concept.

4.5 Members will recall that the Competition Commission has been investigating the bus industry, and in its submission this Council commented on two fares-related issues. On one hand we have supported the concept of integrated ticketing whereby the same ticket can be used across the services of different operators, or even across different modes. It is sometimes overlooked that this already exists in the form of PlusBus, which enables travellers to add bus travel at either end of their journey when buying a train ticket. The Commission's provisional findings support the extension of integrated ticketing, and its full report is due later in the year. The other concern raised by Members has been the level of bus fares locally, and on this subject it is good to note that although some fares have increased during the year, the price of an Exeter DayRider has actually come down, effectively reducing the cost of some return fares within the city, as well as benefitting anyone who travels on more than one bus route in the course of a day.

4.6 DCC and ECC are jointly working on a project to display real time transport and other information on some of the “monolith” information points in the city, largely funded by developer contributions from Princesshay. A key outcome of this is to encourage use of public transport by making information available before setting off for the bus or rail station. Exeter Highways and Traffic Orders Committee (HaTOC) has received a report into the operation of the current information system at bus stops, and has asked DCC’s Cabinet to investigate funding to enable it to be adequately maintained, extended and improved.

4.7 Community transport is an important element of the transport system, and the Council supports the Ring and Ride and TaxiCard systems operated by Exeter Community Transport Association. These contributions have now been brought within the core grants process, with funding decisions being made by the Grants Committee.

4.8 Responsibility for all concessionary fares schemes passed to upper tier authorities on 1 April 2011. DCC was already administering the mandatory national scheme for most Devon districts, including Exeter. In addition, despite severe pressure on its budget, DCC has continued to operate a discretionary companion pass scheme for disabled passengers across the county. In relation to Exeter’s scheme whereby 16 to 18 year olds in full time education received discounted travel, members will recall that ECC forward-funded the continuation of this scheme for the remainder of the 2010/11 academic year, although there is no replacement Devon-wide scheme.

5 TRAFFIC MANAGEMENT AND ROAD IMPROVEMENTS

5.1 Improvements to junction 29 of the M5 and surrounding roads commenced in May, following a successful final funding bid. This scheme is essential to delivery of the Science Park, Skypark and Cranbrook. **(KM)**

5.2 The strategy for managing traffic in the city centre **(KM)** has had to be accelerated to prepare for the opening of the new John Lewis store. Executive resolved in July to support the principle of reducing traffic flow outside the store, as did HaTOC, which has resolved to carry out the necessary stakeholder and community engagement and to pursue the associated traffic orders.

6 CYCLING AND WALKING (KM)

6.1 Exeter’s designation as a Cycling Demonstration Town ended in March, having achieved an impressive network of new infrastructure and a step change in the number of people cycling, exceeding the scheme’s own targets. Exeter has seen an increase in cycle trips of over 40% since 2005, as measured by counters at various locations, with around 20% of secondary school children now cycling to school against a national average of 3%.

6.2 New planning applications continue to be examined to ensure that proposals are as cycle-friendly as possible, including for example good quality cycle parking.

6.3 Walking routes have generally been promoted by the Exeter Walking Project, a partnership between ECC and DCC, coordinated by the sustainable transport charity Sustrans. Achievements of the partnership include the Green Circle walking route around the city, and more recently the improvement of the Sir Alex Walk path between Countess Wear and Topsham. However, for the last few years the focus has been more on facilities which benefit both walkers and cyclists as well as people with disabilities, such as the shared use paths across Wonford Playing Fields and King George V Playing Fields.

6.4 In the light of this, the Exeter Walking Project team has been reformed into an Exeter Walking and Cycling Steering Group (EWCSG). Its terms of reference (see Appendix 2) include considering and promoting individual schemes, as well as developing the Walking and Cycling Strategies for Exeter which are intended to form appendices to the proposed Sustainable Transport Supplementary Planning Document. The joining up of sustainable travel modes is consistent with what is happening at government level, with the introduction of a Local Sustainable Transport Fund, and at DCC where the Cycle Exeter team has been replaced by a Sustainable Transport team. That team's first achievement has been a successful bid to the new fund for £5m over five years, focussed on journeys to work in three broad locations within the county, including Exeter/Exmouth.

7 CONCLUSION

7.1 It can be seen that despite the significant number of different agencies involved in providing transport, Exeter City Council has a significant role to play in securing improvements for Exeter. Currently there are numerous challenges to face, but conversely these bring opportunities for improving Exeter's transport systems to improve the environment and reduce congestion, to the benefit of everyone in the city.

7.2 Therefore, the Council's involvement in transport issues in the coming year will focus on:-

- Influence – working with DCC and others on projects affecting the city, and responding to government consultations with a view to achieving the best outcomes.
- Policy – ensuring that a sound planning policy framework is in place, to engage developers fully in catering for all travel modes within their developments, and to secure appropriate contributions to facilities which will serve those developments.
- Information – ensuring that the public are aware of all travel options available to them, not just how to get around by car.

8 RECOMMENDED

That the report be noted, and that Members offer their continued support for the initiatives designed to encourage more sustainable travel, and the delivery of an ECC transportation function designed to promote the long term interests of the city.

Ross Hussey
Projects and Business Manager

Roger Coombes
Head of Operational Services and Transport

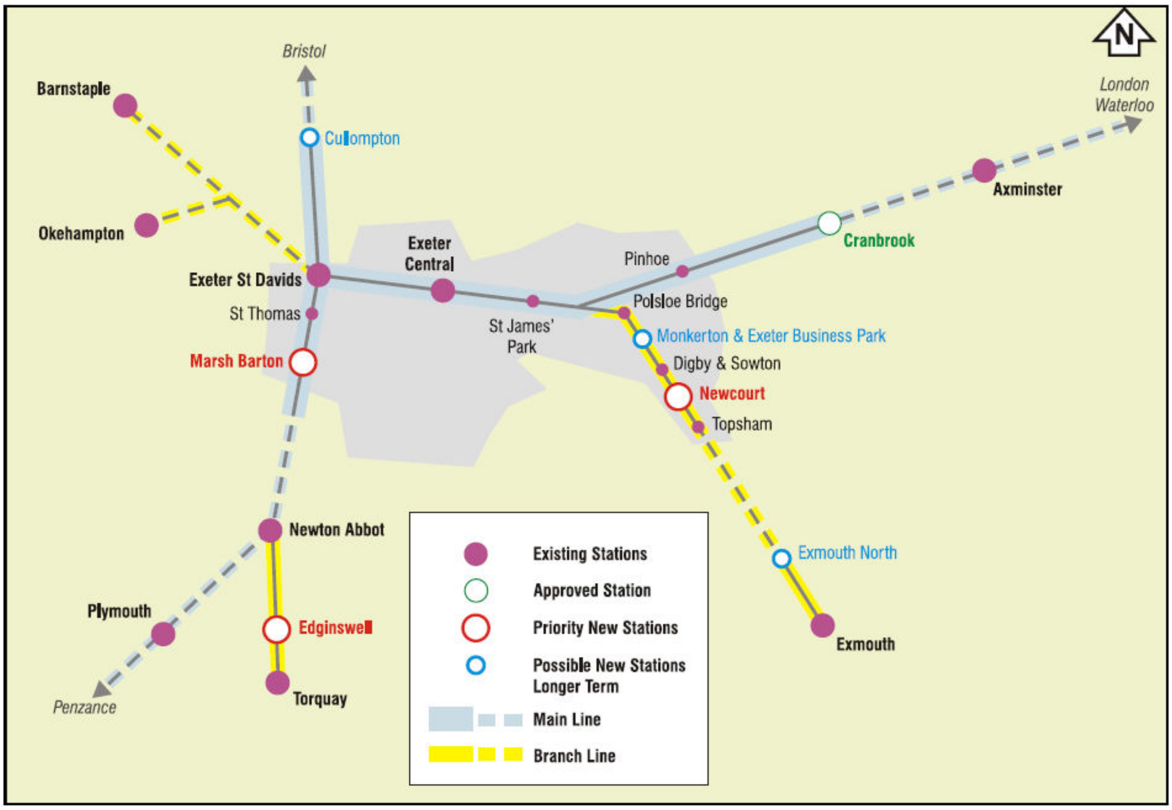
ECONOMY AND DEVELOPMENT DIRECTORATE

Local Government Act 1972 (as amended)
Background papers used in compiling this report:-
"Transportation Strategy: Measures to reduce carbon emissions" – ECC 2010.
Notice of possible remedies, Competition Commission investigation of Local Bus Services.

High Speed Rail: Investing in Britain's Future – consultation – DfT 2011.
Network RUS: Passenger Rolling Stock draft for consultation – Network Rail 2011.

APPENDIX 1

Devon Metro proposals



Short term aims

- 4 car trains in the peaks
- New station on the Exmouth Line
- New station at Marsh Barton
- 30 minute local service frequency on the Paignton line
- Cranbrook station

Longer term aims

- 30 minute frequency to Cranbrook, Honiton and Axminster
- Further new stations on the Exmouth line
- 15 minute frequency on the Exmouth line
- 15 minute frequency on the Paignton line

APPENDIX 2

Exeter Walking and Cycling Steering Group
Terms of Reference

1. The Exeter Walking and Cycling Steering Group (EWCSG) is a partnership of Devon County Council, Exeter City Council and Sustrans.

2. The EWCSG was formed in 2011 to take forward the previous work of the Exeter Walking Project (2001-11) and the Cycle Exeter project (2005-11), given the improved value for money offered by a combined approach to both modes of travel. The Group's focus is therefore on active sustainable travel and the provision of better infrastructure and access for cyclists and pedestrians (including disabled users).

3. The EWCSG will meet bimonthly and consist of appropriate officer representatives of DCC, ECC and Sustrans. Sustrans will coordinate meetings and provide minutes of meetings. DCC or ECC will host meetings.

4. The EWCSG will consider and help to develop the Exeter Walking Strategy, the Exeter Cycling Strategy, Local Transport Plan 3 and LSTF schemes, and other relevant strategic documents for DCC and ECC.

5. The EWCSG will make recommendations and review recommendations from elsewhere (including the Exeter Cycle Forum) for infrastructure improvements, both new schemes and maintenance of existing infrastructure. When appropriate the EWCSG will help decide priorities for programmes of work.

6. The EWCSG will help to promote or initiate campaigns, projects and events to encourage more people to walk and cycle.

7. The EWCSG will endeavour to ensure that the interests and needs of pedestrians and cyclists are considered as part of budget making and planning decisions.

8. The EWCSG will consider access for all to public transport and road transport facilities, such as stations, bus stops and car parks.

9. The minutes of the EWCSG will be available to DCC and ECC committees and members.

Final

EXETER CITY COUNCIL

SCRUTINY COMMITTEE - ECONOMY
8 SEPTEMBER 2011

ECONOMY SCRUTINY STEWARDSHIP TO JUNE 2011

1. PURPOSE OF REPORT

1.1 This report advises Members of any forecast variations to the budget, based on the first three months of the financial year 2011/12.

2. INFORMATION

2.1 This report highlights any differences by management unit to the outturn forecast for the first three months of the financial year up to 30 June 2011 compared with the approved annual budget.

2.2 During this period the total of the variances indicate that the overall net expenditure for this committee will increase by £221,940. This includes supplementary budgets of £125,170. Notional charges in respect of IAS19 Pension Costs and Capital charges have been deducted from this to provide the total budget for management accounting purposes.

2.3 The main variations by management unit are detailed below:

		£
2011-2012 REVISED ESTIMATE Less NOTIONAL CHARGES		**(2,567,770)**
83A3	**CAR PARKING** A saving is anticipated on employee costs due to a number of vacant posts within the Management Unit. This saving has been partially offset by expenditure incurred in respect of the opening and closing of Council Car Parks The National Non Domestic rates and printing budgets will be exceeded, this overspend will be offset by an expected saving the insurance budgets in the management unit.	(10,380)
83A8	**DISTRICT HIGHWAYS & FOOTPATHS** Income has been received in respect of an insurance claim	(3,630)
83B2	**ADMINISTRATION SERVICE** Employment costs are anticipated to be less than the budget due to a number of vacant posts within the management unit. The savings being made on Salaries, National Insurance and Superannuation budgets. The savings made will be recharged back to the various management units within this committee at the end of the financial year.	(21,140)
83B5	**PLANNING** Additional expenditure will be incurred due to costs awarded against the council in respect of a planning appeal at Hill	68,260

Barton Farm.

83B7	**ARCHAEOLOGICAL FIELD UNIT** Members will be aware that the unit is in the process of a staged closure, this overspend is the anticipated cost of the closure included in the report to executive in March 2011. Expenditure in relation to the closure will be closely monitored throughout the financial year with any change to the anticipated cost of closure being reported in future stewardship reports.	286,120
83B9	**MARKETS & HALLS** Expenditure on employment costs in the management unit is expected to be less than the budget with savings being made on National Insurance and Superannuation budgets, the savings on these budgets will be partially offset by an anticipated overspend on overtime and enhancements. A saving will be made on the National Non Domestic Rate Budgets at the Livestock Centre and Exeter Corn Exchange. An overspend is expected on the expenditure budget in respect of event promotion at Exeter Corn Exchange. This overspend will be offset by the income generated from the events staged. Additional income is expected from various sources with the income from livestock sales, commission and rental income all exceeding the budgeted levels.	(74,900)
83C1	**WATERWAYS** A saving will be made on the employment budgets in the management unit due to the retirement of the Canal Manager. The saving on the employment budgets will be partially offset by an anticipated overspend in respect of the cost of marine insurance.	(22,390)
2011-2012 EXPECTED FINAL OUTTURN		**(2,345,830)**

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:

1. None

SCRUTINY COMMITTEE - ECONOMY
STEWARDSHIP

APRIL 2011 TO JUNE 2011

ANNUAL BUDGET	SUPPLEMENTARY BUDGET	NOTIONAL CHARGES***	REVISED BUDGET	CODE		CURRENT OUTTURN FORECAST	FORECAST VARIANCE
£	£		£			£	£
(2,601,490)	0	6,730	(2,608,220)	83A1	PROPERTY & ESTATES SERVICES	(2,608,220)	0
81,680	1,500		83,180	83A2	TRANSPORTATION/CONCESSIONARY FARES	83,180	0
(3,378,900)	0	149,180	(3,528,080)	83A3	CAR PARKING	(3,538,460)	(10,380)
655,030	43,370	8,700	689,700	83A4	ECONOMIC DEVELOPMENT	689,700	0
207,960	0	1,110	206,850	83A5	FESTIVALS & EVENTS	206,850	0
444,400	0	7,170	437,230	83A6	TOURIST INFORMATION	437,230	0
26,000	0		26,000	83A7	ARCHAEOLOGY IN EXETER	26,000	0
355,700	0	138,350	217,350	83A8	DISTRICT HIGHWAYS & FOOTPATHS	213,720	(3,630)
65,490	0	4,800	60,690	83A9	BUILDING CONTROL	60,690	0
129,070	0	6,070	123,000	83B1	LAND DRAINAGE	123,000	0
0	0	2,070	(2,070)	83B2	ADMINISTRATION SERVICE	(23,210)	(21,140)
0	0	2,550	(2,550)	83B3	DIRECTOR ECONOMY & DEVELOPMENT	(2,550)	0
0	0	5,380	(5,380)	83B4	ENGINEERING & CONSTRUCTION SERVICES	(5,380)	0
1,147,180	0	23,690	1,123,490	83B5	PLANNING SERVICES	1,191,750	68,260
66,960	18,000	5,790	79,170	83B6	CONSERVATION	79,170	0
118,070	29,300	13,770	133,600	83B7	ARCHAEOLOGICAL FIELD UNIT	419,720	286,120
0	0		0	83B8	MAJOR PROJECTS	0	0
80,580	3,000	21,940	61,640	83B9	MARKETS & HALLS	(13,260)	(74,900)
345,710	30,000	39,080	336,630	83C1	WATERWAYS	314,240	(22,390)
0							
(2,256,560)	125,170	436,380	(2,567,770)		**NET EXPENDITURE**	(2,345,830)	221,940

*** Includes:
Capital Charges
IAS19 Pension Costs

Reserve Transfers

OVERALL FORECAST EXPENDITURE FOR THE YEAR AFTER MOVEMENTS TO/FROM RESERVES (2,345,830)

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By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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