Exeter City Council

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To the Chair and Members
of the Scrutiny Committee - Economy

AGENDA FOR
EXETER CITY COUNCIL
SCRUTINY COMMITTEE - ECONOMY

The Scrutiny Committee - Economy will meet on **THURSDAY 31 MAY 2012**, 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 **APOLOGIES**

To receive apologies for absence from Committee Members.

2 **MINUTES**

To sign the minutes of the meeting held on 8 March 2012.

3 **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.

4 **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 13 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.

5 **QUESTIONS FROM MEMBERS OF THE PUBLIC UNDER STANDING ORDER 19**

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

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

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

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

7 **PORTFOLIO HOLDERS TO PRESENT THEIR PRIORITIES FOR THE FORTHCOMING YEAR**

Councillor Sutton (Portfolio Holder for Sustainable Development and Transport) and Councillor Denham (Portfolio Holder for Economy and Tourism) will present a verbal report on the priorities for the forthcoming year in light of the Scrutiny Committee's work programme.

MATTER FOR CONSIDERATION BY EXECUTIVE

8 **BUS AND COACH STATION AREA DEVELOPMENT PRINCIPLES**

To consider the report of the Assistant Director City Development – *report circulated* 1 - 12

MATTER FOR CONSIDERATION BY SCRUTINY COMMITTEE - ECONOMY

9 **UNEMPLOYMENT IN EXETER**

To consider the report of the Assistant Director Economy – *report circulated* 13 - 30

There will also be a presentation from Iain Hatt, Assistant Principal, Exeter College and Janet Sinclair, Devon Partnership Manager, Job Centre Plus.

10 **PLACE MARKETING STRATEGY - EXETER ECONOMY 2012 - 2016**

To consider the report of the Assistant Director Economy – *report circulated* 31 - 76

PERFORMANCE MONITORING

11 **CAPITAL PROGRAMME MONITORING**

To consider the report of the Strategic Director – *report circulated* 77 - 80

12 **SCRUTINY ECONOMY REVENUE FINAL ACCOUNTS 2011/12**

To receive the report of the Assistant Director Finance – *report circulated* 81 - 90

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

MATTER FOR CONSIDERATION BY EXECUTIVE

13 **EXETER AND HEART OF DEVON GROWTH BOARD MINUTES**

Members are invited to note the minutes. - *report circulated to Members* 91 - 96

DATE OF NEXT MEETING

The next **Scrutiny Committee - Economy** will be held on Thursday 6 September 2012 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 T Crow (Chair) Mrs S R Brock, Bialyk, Bull, Choules, Crew, Leadbetter, Lyons, Mottram, Pearson, Prowse, Robson, and Wardle

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY
31 MAY 2012

EXECUTIVE
19 JUNE 2012

BUS AND COACH STATION AREA DEVELOPMENT PRINCIPLES

1.0 PURPOSE OF REPORT

1.1 Members will recall the meeting of the Economy Scrutiny Committee and Executive in February 2012 which resolved that the draft Development Principles be approved for the purpose of a public engagement exercise.

1.2 The purpose of this report is to present the responses received and to seek approval for proposed changes to the document and the endorsement of the amended document for development management purposes.

2.0 BACKGROUND

2.1 The Bus and Coach Station Development Principles have been drawn up to guide preparation of a development scheme for this area by a prospective developer, allowing a degree of flexibility whilst ensuring that key principles are delivered.

2.2 The Development Principles were prepared in a series of four collaborative workshops. The workshops included representatives from Exeter City Council and Devon County Council with Land Securities, Chapman Taylor Architecture, English Heritage, and the Commission for Architecture and the Built Environment (CABE).

2.3 The Development Principles supplement the Development Plan Polices. The Exeter Core Strategy was adopted in February 2012 and Polices 1, 2, 3, 8, 9, 14 & 17 are considered pertinent to development of the Bus and Coach Station site. The Exeter Local Plan (1st Review 1995 – 2011) was adopted in March 2005. Policies of the Local Plan are saved until superseded by the LDF process. Local Plan Policy KP3 is a site specific policy relating to the Bus Station site and includes all the land bounded by Sidwell Street, Cheeke Street and Paris Street. Policy KP3 provides for development of ... *“an enhanced bus station, commercial leisure facilities, including potentially a multi-screen cinema, retail floor space, an extended street market, short stay parking and possibly non-family housing”.*

3.0 CONSULTATION METHODOLOGY AND PARTICIPATION

3.1 Public Consultation was be carried out over a six week period commencing 19th March and running until 23rd April.

3.2 Two briefings, aimed at Stakeholders but open to public attendance, were held on the afternoon of Friday 23rd March and evening of Monday 26th March a total of 50 people attended these events.

3.3 Two roadshow events were held at 6 Paris Street on Friday 16th March from noon until 5 p.m. and on Saturday 17th March from 10 a.m. until 3 p.m. 133 people dropped in to talk to officers at these events.

3.4 Static displays were mounted in the Civic Centre and at 6 Paris Street during the consultation period.

3.5 The draft Development Principles document was made available to download via the Exeter City Council website and paper copies were available in the Civic Centre and the Central Library.

3.6 The consultation was also advertised in the Exeter Citizen, which goes to all households, and direct email or letter to stakeholders including business umbrella groups and community associations. The consultation also received coverage in the Express and Echo.

3.7 Reponses were received on the questionnaire form, on post it notes, by letter and by email. Verbal representations were made and recorded at the Briefing and Roadshow events. 19 representations have been received from groups or organisations, 38 letters and emails were received from members of the public, 41 submitted comments on post it notes and 124 people filled in the questionnaire form.

4.0 QUESTIONAIRE RESPONSES

4.1 95% of those who returned the questionnaire supported the redevelopment of the Bus & Coach Station Area.

4.2 There was 91% support for the principles (29% agreed with all the principles and 62% agreed with most of the principles).

4.3 People were also asked to say which they thought were the most important. Principle I (replacement bus station) was selected by 57%. Other principles received lower levels of support but even that least favoured was still picked by 20% of people. Officers consider that the responses are an endorsement of the principles as drafted and show that there are none which are considered inappropriate.

4.4 Narrative responses to the other parts of the questionnaire are included in the section below.

5.0 PUBLIC RESPONSES

5.1 Much of the response to the consultation is in the form of comments, recorded at the briefing events, roadshows or via the feedback form. The purpose of this section is to synthesise the comments into a coherent narrative that fairly sums up the concerns and issues raised through those channels and it is organised on a topic basis.

5.2 Bus Station

There were a lot of comments about what facilities the new bus station should have.

“Passenger friendly waiting areas, that do not have doors which automatically open when someone approaches them”
“It must work properly as a bus station. Features must include enough capacity for current services, for increase in demand, proper passenger information and above all be attractive and functional”
“The current bus station is diabolical when it comes to giving users information on what services are due. Something akin to railway station information boards are required.”

5.3 Retail

There was concern that Exeter has enough shops and that retail units would not be filled or would disadvantage local businesses.

“Any new shops to provide appropriate provision for smaller traders, such as those forced out of Princesshay”
“Shops should be small, low rent for small businesses - no more national chain”
“Exeter has shops that are standing empty. Yes include some retail but the development does not need to be retail”
“Current retail outlets are struggling, we do not need more shops”

5.4 Sidwell Street

There is a lot of concern about the future of the traders in Sidwell Street.

“By mixed use (C) I hope you mean including charity shops, which are an extremely important part of the economy of the area in question, and market stalls (preferably ones the stallholders do not have to erect and dismantle themselves)”
“Whilst I agree the development should have a mix of retail I think it should incorporate the unique shops that exist in Sidwell Street.”
“It is important not to compromise the cheaper retail facilities for lower incomes such as available on Sidwell St”
“I also hope that the street traders will be accommodated”
“reinforcing the current "market and independent style" side of Sidwell street, emphasising local, quality, stalls and produce”
“I do wonder why it is necessary to remove all buildings in Sidwell Street. They are not of architectural merit but they provide affordable shops for some basic and budget shops which are needed by the Exeter shopping public.”

However, there are some disparaging views on the built environment in the area

“'reinforce' Sidwell Street??? Raise to the ground would be the preferred option.”
“Considering its prominence, Sidwell Street is by far the worst part of Exeter, avoided by many, sadly it forms an initial and lasting impression for visitors and tourists.”
“Sidwell Street, as it currently stands, represents a stark contrast to the Princesshay redevelopment and is incredibly unattractive, mostly because the architecture is so poor”

5.5 Leisure uses

There were a great many comments requesting a variety of leisure facilities. The most frequently mentioned was a new theatre.

“Can we have a nationally recognised theatre/concert venue?”
“As above, I believe a new theatre would pay for itself and attract people to Exeter from surrounding areas, and also be a focus for the Exeter Festival”
“Include a good quality theatre that can take the kind of shows that Torquay and Plymouth get, and most of us would never drive to.”

An ice-rink was another popular suggestion

“The development should include a public use facility, such as a theatre, swimming pool, or ice rink”
“An ice-rink for the young-uns”

"I think that the building of an ice rink could be an excellent addition to the development. At the moment, Plymouth has the only permanent rink this side of Bristol"

5.6 Design

Respondents seem to have been excited by the opportunities offered by a new development and there are many views on what it should be like.

"Also, want to include community spaces, available for a variety of community, and I expect more landscaping/planting/ than on offer in High Street and Princesshay"
"Creating a network of streets is important as this helps to create character and reflects how this site, and indeed the rest of the City Centre, looked before the war. It could help create an area that you were happy to mooch in"
"because we've got to get people into the area - to make it a vibrant area with a distinct character - and this seems to me the best way of doing it"
"Not really a principle but I feel that the City needs a large open area that can fulfil several functions and be used for different events - similar to Armada Way in Plymouth."
"I think the architecture shouldn't tower over people - probably not a problem with what is envisaged. Lots of trees and some green areas to soften the look and encourage people just to sit"
"we have an opportunity here to create a wonderful space, based round a market square. Since the redevelopment of Princesshay, we have lost the market square and desperately need another. In addition, we need a flexible performance space in the city centre"

6.0 WRITTEN RESPONSES FROM ORGANISATIONS

6.1 Stagecoach strongly supports the City Council's continued endeavours to regenerate and strengthen the City Centre. Stagecoach operates 160 vehicles and 500 from its Belgrave Road facilities that include offices, administration, maintenance and training. Stagecoach carries 15.5 million customers on Exeter services each year and believes these are vital to the City Centre Economy. The general proposals fro the new bus station are welcomed but Stagecoach requests consultation on detailed plans. Stagecoach is concerned that moving the Bus Station further from the retail centre would be a disincentive to bus use and would have an effect on service viability. The bus station should allow for growth in bus use. The current bus station accommodates coaches and a growing number of National Express and Megabus services. Significant disruption to services must be avoided during development, which should be phased with this in mind. Traffic congestion has a negative impact on the operation and attractiveness of bus services. An operationally satisfactory alternative for the depot before development proceeds.

6.2 Carmel Coaches consider the development principles acceptable. The main concern is that a bus station is developed and not just a series of stands fitted as an afterthought. Provision should be made for visiting coaches to boost tourism.

6.3 National Express are concerned the reference to buses rather than buses and coaches is made in the document. The size of any facility must not be squeezed so as to be unable to accommodate services. Buses and coaches should have common facilities as there is interchange between them and other modes. Access for buses and coaches must be easy and not conflict with car park queues. The bus station should link directly to retail areas; not be hidden away. National Express have experience of working with a large number of modern bus stations, some of which have operational performance or safety issues and would be happy to bring their knowledge of this to the table.

6.4 Transition Exeter. Creation of a modern bus station is an important to help people make more sustainable travel choices. Bus Station should be paid for by all city centre developments. All bus services should use bus station to enable better connections. Optimum location for bus station should be identified. Solution for visiting coaches required. We would welcome protection for small independent retails and provision of a covered market. Greater pedestrianisation would be welcome. Any plans for surrounding roads should be spelled out in this document. Cycling routes should be provided. Consider no parking for retail development in this location. Specification of bus station should be consulted on separately. Principles E & J are supported.

6.5 Travelwatch Southwest is a public transport users group for the Southwest. Short easy routes between any bus and coach station and the city centre should be maintained. Redevelopment is not a necessity. Danger that moving depot will increase operating costs and hence the cost to passengers. A traffic plan should be published in advance of any planning application. In order to give a seamless pedestrian link to the city centre consideration should be given to closing upper Paris Street with bus stops and turning area on Paris Street. Closure of Bampfylde Street and Cheeke Street will have serious implications for surrounding routes. Provision must be made for disabled access and shopmobility should be located close to the bus station.

6.6 Exeter Trades Union Council support redevelopment provided that the level of service and accessibility is improved. Adequate toilets (including disabled), refreshment facilities and convenient and safe pedestrian access routes should be provided.

6.7 Devon Wildlife Trust believe that this represents an opportunity to showcase incorporation of biodiversity into development. The site offers the opportunity for living landmarks and recommend the extensive use of carefully selected trees in open spaces. This is an opportunity to support the Exeter Swift project. Green roofs should be considered.

6.8 RSPB the network of public spaces should contain a significant amount of planting. Living roofs or green walls could be incorporated. Provision for swift nesting should be built in and nest boxes for other urban bird species may be incoporated with planting designed to provide food and shade. An ongoing Wildlife Management Plan should be developed for the site.

6.9 English Heritage consider that the site offers the opportunity to add complimentary value to the city centre but that the development would potentially impact on numerous Heritage Assets in the area. The Development Principles document is the product of evidence gathering and appraisal work and to which we have contributed. We offer broad endorsement of its contents. The document is far from representing a comprehensive brief or masterplan and that work remains to be done.

6.10 Devon and Cornwall Police question the status of this document. They consider it positive that some crime prevention measures have been incorporated in the principles. The current bus station experiences some problems of anti-social behaviour and has issues arising from vagrants frequenting the site which deter use. Development should take in to account Secured by Design advice. Spaces that appeal to a broad demographic have positive benefits. Street furniture should be securely fitted and not crime generators. Car Parks should be encouraged to achieve

Park Mark Safer Parking Award as Bampfylde Street Car Park does. Landscaping should work in harmony with CCTV. Attention should be paid to the design of new routes.

6.11 Exeter Civic Society supports the redevelopment of this part of the city centre. We agree with development being more permeable with Sidwell Street and would welcome the improvement of Sidwell Street, but would wish its current function as a district centre for St. James area to be retained. Development should not come forward as one whilst there are vacancies elsewhere. We advise against hotels or offices if there are vacancies elsewhere. Improvements to public transport do not need to wait for this development. Buildings should provide the main character and cohesiveness for the area. We would like to see the enhancement of surrounding streets and creation of a landscaped space at the junction of Paris Street and Sidwell Street, a landmark feature or fountain would be an alternative to a building. The name ‘London Inn Square’ is questioned as London Inn is no longer there and it would not be the same location. Closing roads in this area will place additional demand on retained routes. Provision for pedestrian crossing on busy roads should be included. Any further congestion will affect bus services. The new bus station should facilitate links between bus services and other transport modes. Consideration should be given to making provision for long distance coaches outside the city centre. Proposals for the alternative depot site should be made known. Support Principle J but clarify last sentence. If Sidwell Street is redeveloped reduced rents should be offered to local business’. Alternative sites for any new pool should also be looked at, if provided here it should be a landmark building. The open air market in Sidwell Street should be retained, perhaps including the farmers’ market.

6.12 Exeter City Council Environmental Health raise concerns that mixed use development can create noise and odour issues for residential elements and this should be addressed through control over detailed matters and requiring plant to be integrated and discharge at high level. Tranquil spaces can be promoted as well as vibrant ones, reduced car use should be promoted.

6.13 Exeter City Council Projects and Business Manger (Sustainable Transport) comments that Principle I should be promoted in the ranking, given the importance of the bus and coach station which has to be accommodated on site, and should be located conveniently for access to the city centre. The bus depot has to be accommodated elsewhere as part of the proposals. Provision of pedestrian and cycle routes throughout, with active frontages, will be particularly important.

6.14 Exeter Walking and Cycling Steering Group. Need for through routes for cyclists; more connectivity to Sidwell Street; Paris Street Roundabout should be reviewed to investigate replacement with a signalised junction; bus station located close to centre; welcoming and attractive design for new bus station; clear and direct onward links.

6.15 Devon County Council (Development Management Team) supports the establishment of these principles. The principles could be more specific, for example about crossing points. Existing businesses should be protected and re-sited if necessary. Smaller units in Princesshay have been less successful. Other desire lines into the site may exist. High quality buildings and public realm should be required. Principle J should be more aspirational.

6.16 Devon County Council is generally supportive of the document and the principles as drafted. Accommodating higher volumes of people travelling to the centre of Exeter will rely on greater use of public transport and the importance of the bus station cannot be underestimated. A peripheral bus station of high quality is less likely to attract patronage than an acceptable quality bus station in a more central location. Operational and passenger access must be considered when considering the location of the new bus station. Adequate stands, layover spaces, passenger facilities, driver facilities and management arrangements will need to be secured. Separate provision will need to be made in the city for coaches. The County Council are keen to support the aspiration of making public transport the preferred means of getting in to the city. Comments on matters of detail are offered. Problems for pedestrian access from Newtown and St. Leonards should also be addressed. Principle C should be amended to strengthen the position of the bus station. The levels within the site make the provision of access for those with disabilities and cyclist challenging, servicing and access should not create conflict with cyclists and pedestrians. Significant investment in buses and bus stops to make them accessible has already been made and this should be matched in the bus station. The opportunity to exploit uses to maintain activity, and hence perceptions of safety around the bus station in the evening should be realised. Routes to and from the bus station should be legible and signposted. The bus station should deliver a positive first impression of the city. The development should not negatively impact on bus routes, particularly the important Sidwell Street corridor. Car Park design should ensure that queuing does not affect the flow of traffic or the safety of pedestrian and cyclists. The scope of the Transport Assessment will need to be agreed with DCC.

7.0 RESPONSE TO THE CONSULTATION

7.1 Although there are a few clear conclusions, the nature of the consultation does not lend itself to neat and straightforward answers. Rather, the respondents have taken the opportunity to express their aspirations and concerns for the development.

- Consultations that lead on concepts such as design principles struggle to engage the wider population.
- There was clear agreement that the site should be developed
- There are some strong concerns, in particular about the future of the bus station and of Sidwell Street as a low cost shopping area meeting local need.

7.2 Some responses addressed matters of planning policy that have been established through the Local Plan and Core Strategy, but most strayed beyond on to matters of design detail not being considered as part of these Development Principles. Those responses are however useful as they concern and can inform work on matters of detail yet to be addressed.

7.3 The main points raised are summarised below with a brief response.

7.4 Bus Station

- ***“Replace bus station / Don’t replace bus station”.*** Principle I requires an enhanced bus station to be delivered by any redevelopment. It makes no prescription about location which needs to be resolved at detailed planning stage. However Principles E, F & H which seek high quality, pedestrian friendly public realm have implications for the siting of a bus station.
- ***“Location of bus station should not be further from City Centre destinations”.*** Positioning the bus station adjacent the retail area with good links for pedestrians to city centre destinations is required by Principle I.

- *“**Safe convenient connection between bus and other modes (Taxi, safe car drop off, city buses, rail) important**”.* The points raised are noted and changes proposed to the supporting text to Principle I to reflect this.
- *“**Bus station must be at Sidwell Street level**”.* It is important that movement between the bus station and city centre is provided without the need to negotiate steps.
- *“**Passenger waiting facilities should be safe and clean**”.* Principle I requires standards for Bus Station to be agreed by ECC, DCC and operators.
- *“**Site bus station at shopping level with active evening uses**”.* The points raised are noted but are considered to be a matter of detail rather than principle.
- *“**Facilities at bus station: exclude takeaway food and drink, include toilets, staff facilities, bus layovers**”.* Principle I requires the standards for Bus Station to be agreed by ECC, DCC and operators.
- *“**Access to bus station must not be compromised by queuing traffic**”.* It is essential that any development proposals allow for the operation of bus services in an efficient manner.
- *“**Transitional arrangements for bus station - concerns expressed**”.* It is essential that any development proposals allow for the operation of bus services during development.
- *“**Alternative drop & parking for coaches to be provided**”.* It is not the role of the Bus and Coach Station to accommodate occasional and intermittent coach services.
- *“**New bus station is a requirement not optional**”.* Principle I is clear on this matter, supporting text to principle A to be amended to avoid any ambiguity.

7.5 Transport issues

- *“**Provide pedestrian access to site from Summerland Street/Sidwell Street corner**”.* Principle F requires the creation of a network of streets that offer permeability and the break down of current obstacles to pedestrian movement.
- “***Paris Street should return to two-way / Paris Street should be pedestrianised***”.
- *“**Traffic queuing problems, delay, noise, air quality**”.* The matters of the detailed impact of the proposals on traffic circulation are properly a matter dealt with at planning application stages and as part of any proposed alterations to the highway network.
- *“**Cycle parking must be provided & cycle access/routes through E-W and N-S**”.* Supporting text to Principle F to be amended to require that provision for cyclists is given consideration.
- *“**Crossing points on adjacent streets (Paris St., Western Way, Sidwell Street) should be looked at**”.* This matter is dealt with in Principle F.
- *“**Bus routing & stops need to be considered**”.* These matters need to be considered if any detailed proposals for alterations to the highway are put proposed.
- *“**Loss of parking**”.* The level of parking provision to be made on the site is not considered to be a matter of principle.
- “***Shop mobility should be linked to new bus station***”. Noted. This is a matter of detail rather than principle.

- *“**The site for an alternative bus depot should be identified**”.* Development of the bus depot area of the site would not be able to progress without a suitable alternative site being delivered.
- *“**Consultation should include highway alterations**”.* Any alterations to the Highway network would are a matter further separate consultation and approval.
- *“**Define ‘accessible’ in terms of streets & bus station**”.* Supporting text to Principles F and I to be amended to clarify the broad meaning of accessibility in this document.

7.6 Retail Issues

- *“**No more retail, unnecessary, many retail vacancies in City Centre**”.*
- *“**Economic situation & internet retailing depresses demand**”.* The capacity for further retail development in the city centre was addressed in the recently adopted Exeter Core Strategy which makes provision for up to 30,000 square metes of additional retail floor space on this site.
- “***Smaller retail units should be provided”.***
- ***“Mix of retail units should be provided”.***
- ***“Affordable rents should be required**”.* Rent levels are a matter between tenant and landlord and cannot be set through this type of document; the supporting text to Principle C can be amended to include reference to a mixture of retail unit types.
- *“**Special provision/protection/relocation for local and independent retailers**”*. As with Princesshay business’ that are in units where redevelopment is proposed would have the opportunity to relocate.
- *“**Market retained/provided/improved**”.*
- *“**Indoor market, farmers market relocated here**”.* Local Plan Policy KP3 requires the existing Sidwell Street market. Supporting text to Principle C amended to echo this.

7.7 Sidwell Street

- *“**Demolish Sidwell Street – outdated/poor**”.*
- *“**Keep Sidwell Street – good example of its time**”* The analysis of architecture in Sidwell Street has shown that there are no buildings that are of a standard considered worthy of protection.

7.8 Uses

- *“**Leisure should be included in principle for consistency with policy KP3**”.* Principle C amended to included leisure as a principal use.
- *“**Theatre / Arts venue / Concert Hall / Ice Rink / Swimming Pool should be provided**”.* These major uses all fall within the definition of leisure uses and would be in accordance with Principle C.
- *“**Housing should be provided**”.* Principle C allows for the provision of an element of housing on the site.
- *“**Opportunity to provide a public space for children / green urban space**”.* The design and role of spaces within the site is a matter of detail for a future

stage. Control of these matters can be achieved through the planning consent stage.

7.9 Structure of document

- *“**Reorder principles to make document more legible**”.* Principle I will be promoted to raise the status of the Bus Station. To avoid confusion this will change will be made for the final version.
- *“**Cut out/explain technical jargon**”.* Where the principles themselves contain technical language this is explained in plain English in the supporting text.
- *“**Premature to site allocations document**”.* The document is informal guidance, supplementing Local Plan and Core Strategy Policies.
- *“**Status of document should be explained**”.* The introduction paragraph will be amended to clarify this.

7.10 Design

- *“**Development must have its own character, but also reflect city & regional character.**”* Supporting text to principle G amended to reflect the need for the area to develop a distinct identity reflecting its location.
- *“**Use more than one architect**”.* Supporting text to Principle G amended to clarify this.
- *“**There must be additional stages of detail and public involvement with those stages**”.* Public consultation required to be carried out by a developer prior to submitting an application. Further stages will include outline and reserved matters planning approvals that will be subject of public consultation.
- *“**No roof level plant / Extracts from kitchens at high level / Plant designed in**”.* These are matter of detail that can be secured at planning application stage

8.0 AMENDMENTS TO THE DEVELOPMENT PRINCIPLES DOCUMENT

8.1 The following changes are proposed:

#	Change
1	Introductory paragraph amended to be explicit about status of document.
2	Principle A supporting text amended to avoid doubt that enhancement of the Bus Station is a requirement.
3	Principle B supporting text to be amended to refer to pace of development not fundamentally undermining other areas of the city centre.
4	Principle B & C supporting text amended to reflect support for Sidwell Street market in Local Plan Policy KP3.
5	Principle C amended to include reference to leisure uses as a significant part of the development
6	Principle C supporting text amended to refer to a mix of retail units.

7	Principle C supporting text amended to be explicit that Bus Depot and overlay bus parking can be moved off-site.
8	Principle F supporting text amended to include reference to links with surrounding residential areas.
9	Principle F & H supporting text amended to include reference to cycles.
10	Principle F & I supporting text amended to define accessibility more fully.
11	Principle G supporting text amended to reflect the need for the development to create a distinct character for the area that reflects itrs location.
12	Principle G supporting text amended to be explicit that more than one architect should commissioned.
13	Principle H supporting text amended to make reference to pedestrians and cyclists
14	Promote Principle I in the order of principles.
15	Principle I supporting text amended to include transfer with other transport modes.
16	Principle I supporting text amended to refer to active evening uses being good neighbour uses for the bus station.
17	Principle J supporting text amended to make reference desirability of forming linkage with surroundings.

9.0 REVISED PRINCIPLES

9.1 The proposed revised development principles are:

A Development must be viable.

B Development must reinforce Sidwell Street, complement the High Street and Princesshay and form a gateway to the city centre.

C The development will be a retail and leisure led mixed use development incorporating a new bus station.

D Development must positively respond to context including the grain of city, archaeology and site levels.

E Development must create a high quality public realm with active frontages.

F Development must create a network of accessible open streets and spaces.

G Building must be individual and of a high architectural quality, with landmark buildings and gateways formed at key locations using materials appropriate to the location.

H Vehicular traffic, servicing and car parking must be accommodated in such way as to minimise their impact.

I An accessible new bus station must be provided to agreed standards.

J The development must adopt high standards of sustainable design and enhance biodiversity.

10.0 RECOMMENDATION

10.1 That Members note the consultation responses and endorse the Bus and Coach Station Development Principles, subject to the amendments listed above, to inform decision making by the City Council.

10.2 That Scrutiny Economy notes the consultation responses and endorses the proposed amendments to the development principles in paragraph 8.1.

10.3 That Executive agrees the proposed response to the public consultation and the amended principles in paragraph 8.1.

RICHARD SHORT
ASSISTANT DIRECTOR CITY DEVELOPMENT

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

1. City Centre: Carbon Emissions, Air Quality and Traffic; Scrutiny Committee-Economy 21 January 2010; Executive 9 February 2010.
2. Transportation Strategy: Measures to reduce carbon emissions/proposed City Council input to DCC Local Transport Plan 2011-16; Scrutiny Committee-Economy 21 January 2010; Executive 9 February 2010.
3. City Centre Vision; Executive 6 December 2011.
4. Exeter Core Strategy adopted February 2012
5. Exeter Local Plan First Review adopted March 2005

EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY
31 MAY 2012

UNEMPLOYMENT IN EXETER

1.0 PURPOSE OF REPORT

1.1 To brief Members on the level of unemployment within Exeter and the nature of support available to help people into work.

2.0 BACKGROUND

2.1 The number of people claiming Job Seekers Allowance (JSA) in Exeter decreased from January to November 2007, when it stood at 927 people. Since then, as elsewhere in the country, the trend in Exeter has been upwards in terms of numbers and duration of claims. By April 2012, there were 2358 people claiming JSA in the city, an overall increase of 1,431 claimants.

2.2 The following sections provide an analysis of JSA claimants and summarises the nature of support available.

3.0 UNEMPLOYMENT

3.1 Appendix 1 contains a number of tables analysing JSA claimants by age, gender, and duration. Figure 1 illustrates JSA claimant rates as a percentage of the working age population for the South West. In April 2012, Exeter's rate stood at 2.8%.

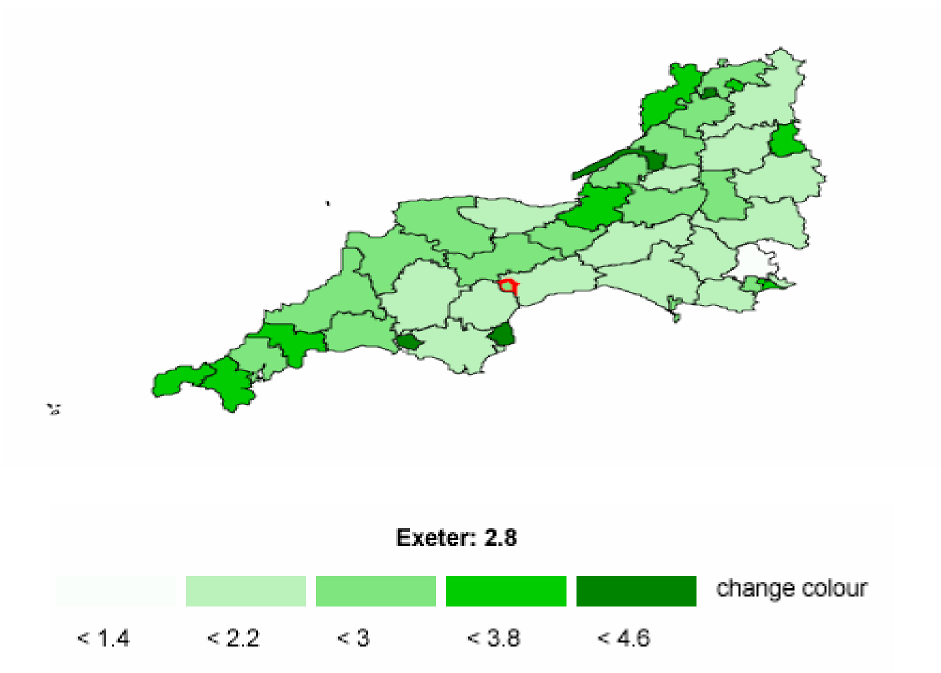

Figure 1 – JSA Claimant Rates for the South West – April 2012

3.2 Set out below is a summary of what has been happening with JSA claimants from April 2007 to 2012, mainly with reference to Exeter.

- As the impact of the recession was felt, JSA claims increased significantly between April 2008 and April 2009 and have not returned to the lower levels seen in 2007.

- The percentage of working age claimants in Exeter in April 2007 stood at 1.4%; by April 2012 it had reached 2.8%. This is equal to the South West rate and below that of Plymouth and England & Wales, both standing at 3.9%.

- Lower JSA rates are seen in Exeter's neighbouring districts, East Devon, Mid Devon, and Teignbridge, ranging from 0.9% in 2007 to 2.2% by 2012.

- In comparison to older age groups, younger people aged 16-24 display the highest JSA claimant rates in Exeter, standing at 3.4% by 2012. The rates for this age group in Exeter's neighbouring districts were lower in East Devon, at 3.2%, but higher in Teignbridge and Mid Devon, standing at 4.0% and 5.0% respectively.

- More men than women are claiming JSA in Exeter, in April 2012, standing at 1,660 men and 698 women.

- Women have mainly lost jobs in sales and customer service occupations. Men have mostly lost jobs in skilled trades, sales and customer service, process, plant and machine operatives and elementary occupations.

- The numbers claiming JSA for longer periods of time has increased in Exeter and its neighbouring districts since 2007 to 2012.

    - Within Exeter the numbers claiming for 6 months or more rose from 175 to 495 and for 12 months plus, from 155 to 465 people. East Devon has also seen a relatively large increase in those claiming for over 12 months, rising from 50 people in 2007 to 200 in 2012.

- Every ward across Exeter has seen increases in the number of claimants.

    - Priory has the highest percentage of claimants, standing at 4.8% of its residents in April 2012.

    - There are 11 wards with 100 or more people claiming JSA. The highest being in St Davids and Priory, which have 235 and 290 claimants respectively.

    - Long-term unemployment, those claiming for 6 months and more are concentrated in Exwick, Newtown, Priory, St Davids, and Whipton & Barton.

4.0 NATURE OF SUPPORT

Coalition Government

4.1 Since the summer of 2011, the Government has been rolling out a programme aimed at helping people back into work.

4.2 In April 2012, the Government launched a Youth Contract, a £1billion intervention to get young people into work and prevent them becoming "NEET" (Not in

Education, Employment or Training) aiming to provide nearly half-a-million new opportunities for young people, including apprenticeships and work experience placements.

4.3 In addition, the Government is proposing to launch by 2013, a universal credit system and a package of support which it states is intended to make work pay and combat worklessness. It remains to be seen whether the level of benefits available will be sufficient or the support provided is appropriate.

4.4 The Department of Work and Pension's impact assessment predicts that under the new system, over 2.8 million households will have a higher entitlement to benefit, 2.7 million will see no change, and 2 million, including 1.1 million with children, will have lower entitlements. A range of independent research indicates the demographic groups most at risk of losing entitlements from these changes will be single parents returning to work and couples working in low paid occupations and who have children.

Apprenticeships

4.5 Apprenticeships and work experience are central to the Government's strategy for skills, emphasising the need for people to develop practical, work-place skills in order to increase their likelihood of sustainable employment. In November 2011, the Government launched their strategy aimed at expanding the number of apprenticeships, 'Skills for Sustainable Growth'. Those who benefit from apprenticeship training (employers and learners) are required to contribute to the costs, whilst eligibility for state-funded training has been reduced, particularly for those aged over 25 years and in work.

4.6 Apprenticeships are open to people aged 16+ living in England, who may be new or existing employees. The work-based training is designed around the needs of employers and lead to nationally recognised qualifications. Depending on the level of qualification achieved, the length of an apprenticeship can take from one to and four years to complete. Once the Apprenticeship has finished there may be an opportunity to carry on working or go on to higher education in a College or University.

4.7 In 2011/12, Exeter saw 990 apprentices starting, an increase of 34% from the previous year. Mainstream funding available in Devon provides employers with incentives to take on apprentices. Currently the funding available is under spent. Details of support are as follows:

- A European funded Skills Support for Unemployed project (SSfU) has funding worth £612,800 for adults (18+) who live in Devon, who are unemployed and in receipt of work related benefits. It offers the skills and employability support needed to improve the chances of the individual gaining employment /starting a new apprenticeship.

- A grant of upto £2,500 for every new apprentice employed from those benefiting from the SSfU project.

Job Centre Plus

4.8 City Council Housing staff are based in the Exeter Jobcentre Plus branch one day a week, undertaking outreach work to help people avoid homelessness.

4.9 Provision to help people into work supported and/or encouraged by Jobcentre Plus is summarised below.

- Work Clubs provide opportunities for unemployed people to receive advice and guidance on building their CV, interviews, and job search techniques.

- The availability of enterprise clubs to help unemployed people start up a small business. Exeter Business Support (EBS) runs the club in the city, established since November 2011. Since May 2011, 114 have participated in a ½ day self employment business awareness workshop and those wishing to start up, have joined the Club for a 5 week course, 33 people have been supported.

- Those who have been claiming JSA for over 6 months can secure a New Enterprise Allowance of up to £1,000 to start up a business if, following support from a local business mentor over an 8 week period, they have produced a viable business plan. EBS is engaged in all stages of this process.

- “Work Together” is an activity which allows JSA claimants to undertake voluntary work within local charities and voluntary organisations providing them with opportunities to maintain their skills or develop new ones.

- “Voluntary Work Experience” is targeted at young people enabling them to learn new skills, and also obtain references – some gain paid employment with the local employer as a result.

- Sector-based work academies facilitate pre-employment training in business sectors that tend to have a high volume of vacancies. Job Centre Plus has been working with the Employment and Skills Board to extend this activity across the sub-region. Within Exeter for example, an employer is creating several hundred jobs; they have guaranteed to interview 80 JSA claimants. If necessary, claimants are placed on a 2-3 week course to provide them with the skills required to meet the minimum requirements for interview.

- People considered to be at risk of long term unemployment can join the Work Programme. Two national providers, Prospects and Working Links, run the service In Exeter. Individuals can stay on this supported scheme for up to two years aiming to resolve barriers preventing them finding work or until they find sustained employment.

Work Programme

4.10 Working Links and Prospects are believed to have an active caseload supporting approximately 1,400 people within Exeter and the surrounding area, of which some 1,000 are likely to be city residents. Success data and outputs are not known.

4.11 Participants on the Programme are predominantly JSA claimants, although some are claiming Employment Support Allowance, Incapacity Benefit, or Income Support. Summarised below is the type of support provided.

- Providing employability skills to include CV Workshops and development, interview skills and techniques, assistance and guidance with completing application forms

- Ensuring customers have Proof of Eligibility to work in the UK, a suitable bank account and a Better off in Work Calculation which aims to show the hours/salary they need to achieve to be better off in work than on benefits

- Focussing on improving confidence, motivation and self-esteem

- Sector-specific training and preparation linked to either employer or general labour market demand

- Support for 18 – 24 year olds through the Youth Contract supporting transition into apprenticeships

- Support for customers with health conditions provided by specialist providers

- Dedicated support for customers interested in Self-Employment

Employment and Skills Board (ESB)

4.12 Exeter City Council is a member of the Exeter and Heart of Devon (EHOD) Employment and Skills Board; an employer-led partnership. The Board's "Preparing for Employment" working group focuses on encouraging partners resources toward activities supporting transition into employment and avoiding becoming "NEET". Listed below are some activities of the working group.

- Running the 'Get Devon Working' Campaign between April 2012 and September, the working group is aiming to secure 100 employers within EHOD to offer work and student placements and/or also employ apprentices.

- Securing a better match between skills supply and employer demand by aiming to increase the number of young people receiving relevant education and training leading to real local job opportunities. For example, local technology, engineering and professional service companies have a strong requirement for "STEM" subjects (science, technology, engineering, and mathematics).

- Funding has been secured to pilot a project aimed at boosting the employability skills and practical knowledge of 160 unemployed people in Exeter, and for 40 of them to gain City and Guild qualifications.

Exeter Citizens Advice Bureau (CAB)

4.13 Exeter CAB works with many voluntary organisations that offer volunteering opportunities which support people to make the transition into the job market. In 2011/2012, Exeter CAB offered 83 volunteering places, of which 11 volunteers went on to paid employment or further education.

4.14 The CAB provides a range of advice and information services that indirectly help people back to work. For example, they offer a service to Working Age Carers, debt advice to people on low incomes and the unemployed, and generalist employment advice to local people. In addition, they provide 'better off in work' calculations to clients, and assistance with accessing and maintaining working tax credits.

4.15 In 2011/2012, Exeter CAB helped 3,877 people with a wide range of employment, personal and finance related problems. Over this 12 month period, they saw an 11% increase in employment related enquiries, and an 8% increase in enquiries about changes to welfare benefits and tax credits.

Exeter Positive Steps Fund

4.16 Devon Community Foundation coordinated the Exeter Positive Steps Fund co-financed by the Council and a local charity for projects that help local people who are hard to reach and who face barriers on the pathway into employment. There is no identified Council funding in 2012/2013 for Positive Steps. The activities funded up until March 2012 appear to be met by the range of Government initiatives now underway.

4.17 Since the fund started in August 2010, the following have been undertaken with some residual activity continuing.

- 12 projects have been funded, 10 of which have now concluded

- Of the 2 projects remaining – Exeter YMCA provides job clubs in 3 of the most deprived areas in the city, and Exeter Youth Enquiry Service's club is specifically aimed at supporting young people into work. The former concludes in September 2012 and the latter started later than planned, in February 2012 and ends in February 2013.

- As of March 2012, 593 disadvantaged people in Exeter, the majority of which drawn from the most deprived areas of the city, have been supported to build their confidence and employability skills, of which –

  - 95 have gone on to further training (12 from Exeter YMCA Job Club)
  - 79 have gone into voluntary work (11 from Exeter YMCA Job Club)
  - 56 have found paid employment (30 Exeter YMCA Job Club)
  - 25 have come of benefits

- The Exeter Youth Enquiry Service Job Club's aims to support 100 hard to reach young people (16 to 19 years old) affected by learning disabilities or mental health issues helping help them on the pathway into paid employment.

5.0 LOOKING AHEAD

5.1 The work of all local organisations providing direct and indirect support to help people into work in Exeter has not been assessed in the preparation of this report. Nevertheless, the information and issues covered suggest that support to help people back into work within Exeter is diverse and extensive. However, more than 2,350 people are unemployed.

5.2 The Council may wish to initiate and/or facilitate additional activities in seeking to make a difference in reducing unemployment levels in Exeter and the affect that has on residents and the prosperity in the city.

Apprenticeships

5.3 Officers have been in contact with the National Apprenticeship Service (NAS) which is a Government Agency tasked with promoting the employment and training of apprentices. According to NAS local government employs up to 40% of the total workforce nationally but employs fewer than 5% of all apprentices.

5.4 The Council has a limited number of trainees in post but does not employ any apprentices. It may seek to recruit a number of resident younger people as apprentices which could have a positive impact on the numbers unemployed and demonstrate the Authority's commitment with other local employers. NAS would provide a dedicated account manager to work with the Council to develop and implement an apprenticeship employment strategy.

5.5 The Council is a major employer and influencer in the city which it could use to good effect to raise awareness with local businesses to take on new recruits, work, and student placements.

5.6 It is proposed that Officers:

- develop a Council apprenticeship employment strategy, and explore the financial viability of employing upto 10 young people as apprentices within the Council

- work to influence local major employers to establish a recruitment programme that employs collectively upto 100 new apprentices suited to business needs

5.7 In addition, NAS has suggested the Council may wish to develop an approach aiming to secure agreement and achieve agreed outputs (expected jobs, work experience, skills, and apprenticeships) through procurement and planning activity over which it has an influence.

5.8 It is proposed that Officers develop a policy with NAS that secures increases in employment, skills development, and apprenticeships arising from the procurement of major projects through its approval of planning developments.

5.9 An avenue to be explored arises from an outline proposal from Exeter CAB. They would be interested in a scheme to support small charities, such as their own, to offer apprenticeships to local people. It is proposed that Officers work with the Employment & Skills Board and NAS to explore how small local charities may be enabled to employ local people on apprenticeships.

Work Experience

5.10 It has been suggested to Officers in discussion with Job Centre Plus and the Employment and Skill Board that the Council also seeks to provide more work experience placements for those people claiming JSA in Exeter. This would help to provide local people with an opportunity to maintain or develop their skills, build confidence, secure a good reference from the Council, and help them, as a consequence, to be in a better position to find employment.

5.11 It is proposed that Officers:

- seek to establish a work placement strategy for upto 25 job seekers within the Council
- work to influence local major employers to provide work placements for at least 300 Exeter resident job seekers

Supporting Volunteering

5.12 Volunteering helps people of working age to improve their employability. It is proposed that Officers work with the Employment and Skills Board and voluntary sector to explore ways of enabling local charities to recruit and support more volunteers of working age.

Work Clubs

5.13 Most of the clubs run in the city for JSA claimants, with the exception of those provided by Exeter YMCA and the Exeter Youth Enquiry Service, are largely provided on a voluntary basis.

5.14 "Forward 25 Careers" provide one such 'work club', which is part of a social enterprise based at the University's Innovation Centre. The 'club' is supported through private sponsorship, pro bono work time, and provision of workspace. The following summarises activities and outputs since April 2011.

- 24 unemployed people have been supported on 8 week projects, 14 people have gone onto further training, apprenticeships, employment or self-employment

- Participants:

  - are referred from Job Centre Plus who have been unemployed for 3 months and over
  - must be computer literate
  - are normally based in Forward 25 Careers workspace, although they can be managed virtually managed, if they are based in an employer's office
  - work on 'task and finish' projects sourced by Forward 25 Careers from their network of local employers (no remuneration is received)
  - have worked on projects from data entry, data analysis, graphic design, web design and PR activity
  - grow in confidence, gain new skills, receive support in job searching techniques, job applications and advice on improving their CV
  - receive references from Forward 25 Careers and also from the local employer allocating the project

5.15 This method of supporting people into work can be replicated in any employer's workspace where there is a computer, desk and a supportive set of individuals. Forward 25 Careers have offered to assist with setting up these spaces, identifying projects and can work virtually with individuals.

5.16 It is proposed that Officers explore with Forward 25 Careers and other providers of work clubs to explore how unemployed people can be supported on 8 week projects enabling them to go onto further training, apprenticeships, employment or self-employment.

Raising Awareness

5.17 The Work Programme providers were consulted on the gaps in provision to help people back into work in Exeter. The following bullet points provided by Working Links, might suggest a role the Council could usefully play in facilitating support through a range of partners in the Employment and Skills Board.

- Insufficient support for 16-18 year olds helping them into employment

- A need to raise awareness with local employers with regard to the importance and significance of assisting in reducing levels of unemployment

  - Exeter CVS have recently launched an initiative with local leading employers including Officers from the Council's Economic Development Service aimed at focusing business minds on what they can do to practically help people into work and also support community well-being

- Limited understanding and awareness by local employers on how to make adjustments in their working practices which would enable them to employ and support staff with health conditions and disabilities.

5.18 It is proposed that Officers work with partners to facilitate support and stimulate awareness which addresses the gaps in provision identified by the Work Programme Providers.

5.19 The Systems Review of the Customer Service Centre provides the opportunity to ensure that addressing worklessness is made integral to the advice that we give to our residents to help them back into financial independence. This represents the most direct way that the organisation can have an impact by pulling together a number of strands of work that are currently being advanced.

5.20 It is proposed that Officers involved in the Systems Review of the Customer Service Centre, Housing Benefits, Housing Needs and Rents encompasses the worklessness agenda under the purpose of "Help me back to financial independence".

6.0 FINANCIAL IMPLICATIONS

6.1 There are no immediate financial implications arising from this report. However financial implications may arise following the further development of the proposals.

7.0 RECOMMENDATION that:

7.1 Members comment on the report

7.2 Members support the proposed activities set out in Section 5

RICHARD BALL
ASSISTANT DIRECTOR ECONOMY

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

Appendix 1

Claimant count rates as a percentage of the working age population – 16 to 64 years, April 2007 onwards

The JSA claimant rate for Exeter shown in Table 1 virtually mirrors that of the South West, running at 1.4% in 2007, reaching 2.8% in 2012. Lower rates can be seen in Exeter's neighbouring districts, which largely make up the travel to work area. East Devon displays consistently lower claimant count rates. Plymouth in contrast, reflects the picture seen across England and Wales, increasing from 2.2% in 2007 to 3.9% in 2012.

Table 1: Total JSA Claimants and Rates: 2007 – 2012

Date	Exeter (%)	East Devon (%)	Teignbridge (%)	Mid Devon (%)	Plymouth (%)	South West (%)	England & Wales (%)
Apr-07	1,184 (1.4)	658 (0.9)	843 (1.1)	501 (1.1)	3,739 (2.2)	46,503 (1.4)	810,527 (2.3)
Apr-08	1,014 (1.2)	550 (0.7)	635 (0.8)	460 (1.0)	3,299 (1.9)	40,731 (1.2)	736,789 (2.1)
Apr-09	2,405 (2.9)	1,544 (2.1)	1,889 (2.5)	1,130 (2.4)	6,587 (3.8)	97,388 (3.0)	1,383,933 (3.9)
Apr-10	2,154 (2.6)	1,327 (1.8)	1,555 (2.0)	878 (1.9)	6,312 (3.6)	89,089 (2.7)	1,372,068 (3.8)
Apr-11	2,170 (2.6)	1,267 (1.7)	1,499 (2.0)	872 (1.9)	6,552 (3.8)	84,347 (2.5)	1,319,267 (3.7)
Apr-12	2,358 (2.8)	1,258 (1.7)	1,610 (2.1)	1,029 (2.2)	6,776 (3.9)	91,790 (2.8)	1,410,203 (3.9)

Age

Table 2 displays the number of people claiming JSA and the rate of unemployment for each age group for April 2012. The youngest age group, 16 to 24 years, displays the highest rates, with higher rates seen in Exeter's hinterland, Plymouth, regionally and nationally.

Exeter's JSA rate for young people, at 3.4%, is considerably lower than the other locations, with the exception of East Devon. However, the rate has increased by 104% since 2007, from 375 young people to 765 in 2012. Across EHOD the total numbers of JSA claims from 16 to 24 year olds has increased at a similar rate to Exeter.

Table 2: JSA Claimants by Age Group

	April 2012						
Age	**Exeter (%)**	**East Devon (%)**	**Teignbridge (%)**	**Mid Devon (%)**	**Plymouth (%)**	**South West (%)**	**Great Britain (%)**
16 - 24	765 (3.4)	365 (3.2)	475 (4.0)	335 (5.0)	2,330 (5.2)	4.5	6.3
25 - 49	1,220 (2.9)	620 (1.8)	800 (2.2)	500 (2.2)	3,485 (4.1)	2.9	4.1
50 +	365 (2.0)	275 (0.9)	330 (1.2)	195 (1.2)	945 (2.2)	1.5	2.2
Total	2,350 (2.8)	1,260 (1.7)	1,610 (2.1)	1,030 (2.2)	6,760 (3.9)	2.8	4.0

(% in brackets – of resident population of the same age)

Gender

Table 3 shows the number and proportion of males and females claiming JSA in Exeter. In April 2007, men accounted for 74% of the total JSA claimants and women 26%. Female claims increased most significantly between 2008 and 2009. By April 2012, women accounted for 30% of JSA claimants in Exeter.

The gender claimant pattern in Exeter is similar across the other three EHOD districts. In 2012, the proportions of women claiming JSA in East Devon, Mid Devon, and Teignbridge was slightly higher than Exeter's, standing at 33%, 33%, and 31% respectively.

Table 3: JSA Claimants by Gender

Exeter						
	April 07 (%)	**April 08 (%)**	**April 09 (%)**	**April 10 (%)**	**April 11 (%)**	**April 12 (%)**
Male	873 (2.1)	736 (1.8)	1,748 (4.2)	1,530 (3.7)	1,495 (3.6)	1,660 (4.0)
Female	311 (0.8)	278 (0.7)	657 (1.6)	624 (1.5)	675 (1.6)	698 (1.7)
Total	1,184 (1.4)	1,014 (1.2)	2,405 (2.9)	2,154 (2.6)	2,170 (2.6)	2,358 (2.8)

(% figure in brackets – resident population of area aged 16-64 by gender)

Duration

Table 4 shows duration of claims for JSA within Exeter. By April 2012, claims across all three time scales, from shortest to longest have since 2007, increased by 550, 320, and 310 respectively.

The three other EHOD authorities have a similar pattern to that of Exeter with increases in JSA claims for 6 to 12 months and 12 months or over. East Devon saw a particularly high increase in claims for 12 months and over, rising from 50 people in 2007 to 200 in 2012, an increase of 300%.

Table 4: JSA Claims by Duration

Exeter						
	April 07	**April 08**	**April 09**	**April 10**	**April 11**	**April 12**
Up to 6 months	845 (1.0)	815 (1.0)	1,965 (2.4)	1,530 (1.8)	1,635 (2.0)	1,395 (1.7)
6 to 12 months	175 (0.2)	120 (0.1)	330 (0.4)	360 (0.4)	325 (0.4)	495 (0.6)
12 months or over	155 (0.2)	70 (0.1)	100 (0.1)	260 (0.3)	200 (0.2)	465 (0.6)

(% figure in brackets – persons claiming JSA as a proportion of resident population)

Duration by Age Groups

Table 5 shows the impact on young people in Exeter, 16 to 24 years. Young people claiming JSA for 6 months plus have increased more than other age groups.

Across Exeter's hinterland, East Devon saw increases in young people claiming, from 10 in 2007, to 75 in 2012. Claims for over a year have increased across EHOD, most significantly in Mid Devon and Exeter, from zero claims in 2007 to 55 and 5 to 100 respectively by 2012.

Table 5: JSA Claims of 16-24 years olds by duration

Exeter						
	April 07	**April 08**	**April 09**	**April 10**	**April 11**	**April 12**
Up to 6 months	325 (1.4)	325 (1.4)	750 (3.4)	555 (2.5)	590 (2.6)	505 (2.3)
6 to 12 months	40 (0.2)	20 (0.1)	90 (0.4)	105 (0.5)	80 (0.4)	160 (0.7)
12 months or over	5 (0.0)	5 (0.0)	10 (0.0)	45 (0.2)	20 (0.1)	100 (0.5)

(% figure brackets – proportion of resident population aged 16 to 24 years)

Unemployment by Ward

Every ward has experienced an increase in JSA claimants since 2007; the biggest percentage changes have occurred in Alphington, Heavitree, Pennsylvania, Pinhoe, Polsloe, Priory, St Leonard's, St Loyes, St Thomas and Whipton & Barton. The highest JSA rates are in Priory and St David's, both have over 200 JSA claimants (April 2012.

Table 6 overleaf, displays the total JSA claims and the duration including the proportion of working age people resident in each ward. The claimant count rate in eight of Exeter's wards exceeds the city average of 2.8%, most notably in Mincinglake, Newtown, Priory, St David's, St Thomas and Whipton & Barton. Two wards exceed the national (GB) average of 4.0%: Priory and St David's. In terms of duration of JSA claims, the highest concentrations in Exeter's wards are as follows:

- Up to 6 months in Alphington, Exwick, Mincinglake, Newtown, Polsloe, Priory, St David's, St James, St Thomas, and Whipton & Barton.
- 6 to 12 months in Exwick, Priory, St David's and Whipton & Barton
- 12 months + in: Exwick, Newtown, Priory, St David's and Whipton & Barton

Table 6: Exeter JSA Claimants and Rates April 2012

Ward	April 2012	Up to 6 months	6 to 12 months	12 months or over
Alphington	145 (2.5)	90	30	25
Cowick	100 (3.0)	55	25	20
Duryard	25 (0.5)	15	5	5
Exwick	185 (2.9)	95	45	40
Heavitree	80 (2.2)	55	15	10
Mincinglake	150 (4.0)	90	35	30
Newtown	165 (3.6)	95	35	40
Pennsylvania	90 (2.4)	55	20	10
Pinhoe	95 (2.4)	55	15	20
Polsloe	135 (2.5)	85	25	25
Priory	290 (4.8)	175	50	65
St David's	235 (4.1)	130	50	55
St James	125 (2.3)	85	20	20
St Leonards	60 (1.9)	35	15	10
St Loyes	85 (2.1)	45	25	20
St Thomas	165 (3.5)	105	30	25
Topsham	35 (1.2)	20	10	5
Whipton & Barton	180 (3.8)	100	45	40
Exeter	**2,350 (2.8)**	**1,395**	**495**	**465**

Figure 2 overleaf illustrates the variation in JSA claimant counts across Exeter's wards between 2007 and 2012. Table 7 which follows, uses the same data, highlighting not only the absolute numbers of people claiming in each ward but also the rate of claims as a percentage of each ward's working age population.

Figure 2: Exeter Wards JSA Claimant Counts 2007 - 2012

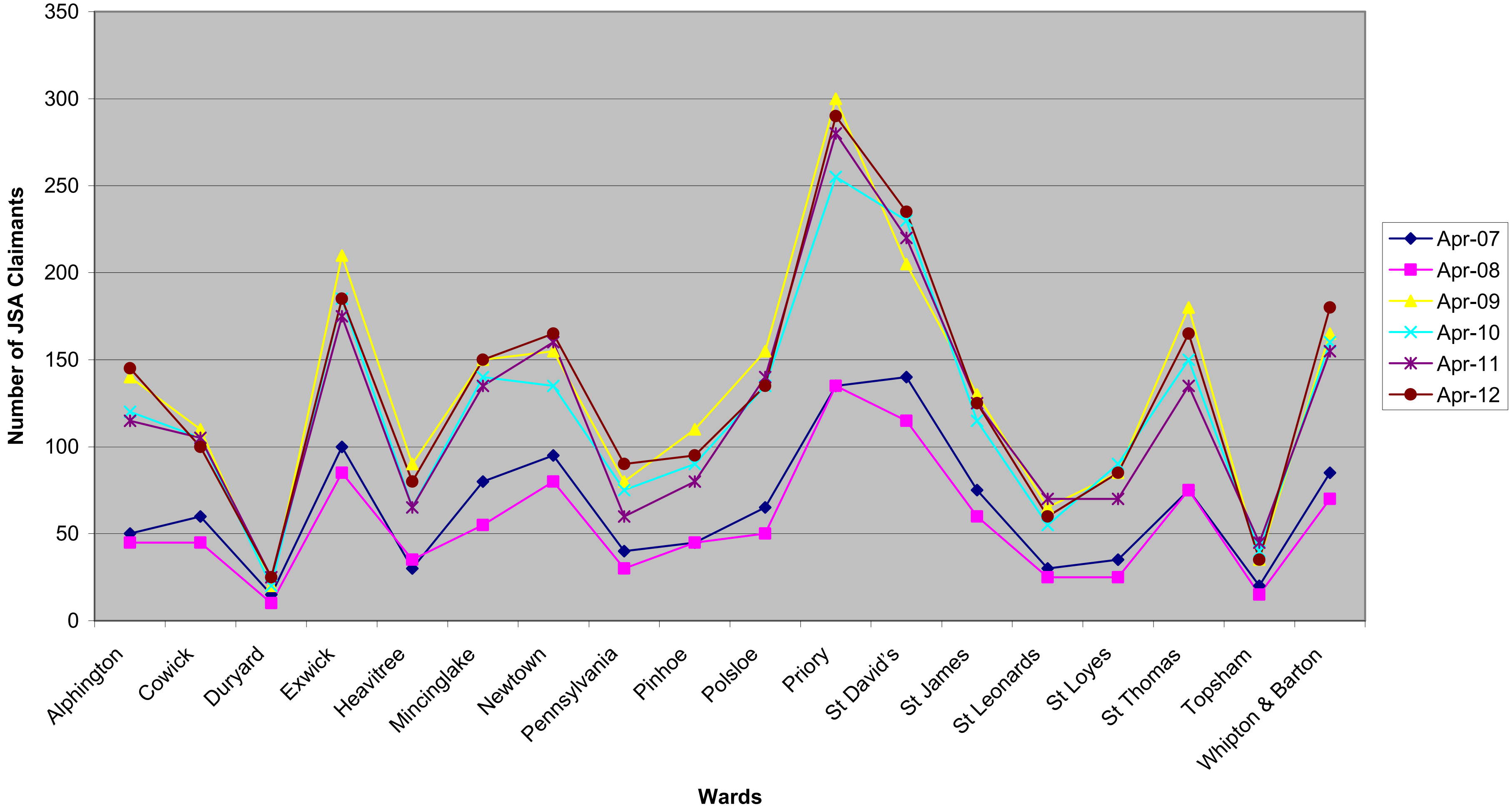

Table 7: Exeter Wards: JSA Claimant Rates 2007 – 2012

Ward	April 07	April 08	April 09	April 10	April 11	April 12
Alphington	50 (0.8)	45 (0.8)	140 (2.4)	120 (2.0)	115 (2.0)	145 (2.5)
Cowick	60 (1.8)	45 (1.4)	110 (3.3)	105 (3.0)	105 (3.1)	100 (3.0)
Duryard	15 (0.2)	10 (0.2)	20 (0.4)	20 (0.4)	25 (0.5)	25 (0.5)
Exwick	100 (1.5)	85 (1.3)	210 (3.4)	185 (2.9)	175 (2.8)	185 (2.9)
Heavitree	30 (0.9)	35 (0.9)	90 (2.5)	65 (1.8)	65 (1.8)	80 (2.2)
Mincinglake	80 (2.1)	55 (1.4)	150 (4.0)	140 (3.7)	135 (3.5)	150 (4.0)
Newtown	95 (2.0)	80 (1.7)	155 (3.4)	135 (2.9)	160 (3.5)	165 (3.6)
Pennsylvania	40 (1.1)	30 (0.8)	80 (2.2)	75 (2.0)	60 (1.7)	90 (2.4)
Pinhoe	45 (1.1)	45 (1.2)	110 (2.8)	90 (2.3)	80 (2.0)	95 (2.4)
Polsloe	65 (1.2)	50 (1.0)	155 (2.9)	135 (2.6)	140 (2.6)	135 (2.5)
Priory	135 (2.2)	135 (2.2)	300 (5.0)	255 (4.2)	280 (4.7)	290 (4.8)
St David's	140 (3.1)	115 (2.4)	205 (3.7)	230 (4.0)	220 (3.8)	235 (4.1)
St James	75 (1.4)	60 (1.2)	130 (2.5)	115 (2.1)	125 (2.3)	125 (2.3)
St Leonards	30 (0.9)	25 (0.8)	65 (2.0)	55 (1.6)	70 (2.1)	60 (1.9)
St Loyes	35 (0.9)	25 (0.7)	85 (2.1)	90 (2.3)	70 (1.7)	85 (2.1)
St Thomas	75 (1.7)	75 (1.6)	180 (3.9)	150 (3.2)	135 (2.8)	165 (3.5)
Topsham	20 (0.8)	15 (0.5)	35 (1.3)	40 (1.3)	45 (1.5)	35 (1.2)
Whipton & Barton	85 (1.7)	70 (1.5)	165 (3.4)	160 (3.3)	155 (3.3)	180 (3.8)
Exeter Total	**1,180 (1.4)**	**1,005 (1.2)**	**2,395 (2.9)**	**2,150 (2.6)**	**2,160 (2.6)**	**2,350 (2.8)**
Great Britain %	2.3	2.1	3.9	3.8	3.7	4.0

(Figures in brackets represent the percentage of JSA claimants of working age in each ward)

Table 8 details the number of JSA claimants within Exeter's wards:

- Of 16 – 24 year olds the highest numbers are in Priory (115), St David's (85) and Exwick (65)
- Of 25 – 49 year olds the highest numbers are in Priory (140), St David's (115), Exwick and Polsloe (both 95), and Newtown, St Thomas and Whipton & Barton (all 90)
- Of 50+ year olds the highest numbers are in Priory (40) and St David's and Whipton & Barton (both 35)

Table 8: Exeter Wards JSA Claimants by Age Group – April 2012

Ward	16 – 24 (%)	25 – 49 (%)	50 + (%)
Alphington	50 (33.3)	70 (48.3)	25 (18.4)
Cowick	40 (42.0)	45 (43.0)	15 (15.0)
Duryard	10 (40.7)	10 (44.4)	5 (14.8)
Exwick	65 (34.4)	95 (51.9)	25 (13.7)
Heavitree	20 (22.8)	50 (60.8)	15 (16.5)
Mincinglake	45 (30.3)	75 (48.7)	30 (21.1)
Newtown	50 (28.7)	90 (54.5)	30 (16.8)
Pennsylvania	20 (22.7)	50 (58.0)	15 (19.3)
Pinhoe	30 (34.0)	50 (53.2)	10 (12.8)
Polsloe	30 (21.5)	95 (68.9)	15 (9.6)
Priory	115 (39.0)	140 (47.6)	40 (13.4)
St David's	85 (36.4)	115 (49.6)	35 (14.0)
St James	50 (38.4)	60 (47.2)	20 (14.4)
St Leonards	15 (25.8)	35 (58.1)	10 (16.1)
St Loyes	25 (30.2)	50 (59.3)	10 (10.5)
St Thomas	50 (29.4)	90 (54.6)	25 (16.0)
Topsham	10 (35.3)	15 (44.1)	5 (20.6)
Whipton & Barton	55 (31.3)	90 (48.4)	35 (20.3)
Exeter %	32.5	52.0	15.5
Great Britain %	29.3	54.8	15.9

* % refers to the proportion that age group makes up in overall JSA claims for that area
* % may not add up to 100 because of rounding

Unemployment by Most Deprived Neighbourhoods

Data on JSA claimants is also available at a proxy neighbourhood level, known as 'Lower Super Output Areas' (LSOAs), each consisting of some 600 households. There are 73 LSOAs in Exeter. These areas are used by Government to provide an analysis of deprivation across England.

The latest data available is for 2010. The data covers a range of variables, including relative levels of deprivation for employment in comparison to all LSOAs across England.

Table 9 shows the Exeter LSOAs which fall within the top 10% and 20% of the most deprived areas for levels of employment deprivation in England. Employment deprivation refers to people who would like to work but are unable to do so through unemployment, sickness or disability.

There are seven LSOAs in the most deprived 20%, with two falling in the most deprived 10%.

Table 9: Employment Deprivation in Exeter

Lower Super Output Area	Ward
Most Deprived 10%	
Sidwell Street and Clifton Road area	Newtown
Cathedral and City Centre East	St David's
Most Deprived 20%	
Burnthouse Lane (Trees)	Priory
Leypark and Bramley Avenue area	Whipton Barton
City Centre West	St David's
Burnthouse Lane (Rifford Road)	Priory
Lancelot Road area	Minclinglake

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY
31 MAY 2012

PLACE MARKETING STRATEGY – EXETER ECONOMY 2012 – 2016

1.0 PURPOSE OF REPORT

1.1 To seek Members comments on the draft Place Marketing Strategy.

2.0 BACKGROUND

2.1 Increasingly cities and their surroundings are competing to attract investment and business. It is difficult for a place to stand out without proactive effort across a range of media.

2.2 The September 2011 report and initial draft Strategy for consideration by this Committee proposed the development of a city wide approach to proactively marketing Exeter that would establish and reinforce its reputation at the regional capital and attract investment, businesses and key workers. The formation of a marketing alliance was proposed that should consist of local key partners across the private and public sector whose support was required to help shape and subsequently implement an agreed Strategy.

2.3 Officers have established the Marketing Alliance. The revised draft Strategy which includes a proposed brand statement for use in promotional activity is attached for consideration.

3.0 DRAFT PLACE MARKETING STRATEGY

3.1 The Place Marketing Strategy's purpose is to attract and retain investment, new businesses, and skilled workers to help underpin the growth of the Exeter economy.

3.2 The aim of the Strategy is: "To establish and reinforce Exeter's reputation as the regional capital and principal economy south west of Bristol for attracting investment, successful businesses, and skilled workers".

3.3 The proposed Objectives, 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 area's reputation for having a leading combination of retail, heritage and cultural experiences in an outstanding environment
- attract and retain skilled workers and graduates.

3.4 Research indicates that cities are viewed as the 'shop window' and a key point of reference, when they or their surrounding area is being assessed as a location for investment, for relocating and expanding employers or as a place of work.

3.5 As competition increases between cities those with tangible and credible opportunities are better placed to secure and convert interest, provided they proactively promote themselves in an effective manner.

3.6 Many investors, businesses, and skilled workers if made aware of the Exeter economy's track record of success and its future development plans could gain the confidence they need to make that crucial decision to share in the successful continued growth in the local economy.

4.0 SUMMARY OF PROPOSED ACTIONS

4.1 The Strategy proposes a marketing programme that seeks to raise awareness of the local economy's strengths and opportunities to key decision makers and influencers, initiate targeted marketing of key sectors to help the economy grow and challenge misconceptions about the area.

Promotional – raising awareness of Exeter's offer

4.2 The range of activities proposed to reach key decision makers and influencers are summarised below:

- using a range of media and 'vehicles' to raise awareness of Exeter economy including key strengths and characteristics:
    - developing and regularly updating an effective promotion and marketing website
    - an investment prospectus which can be adjusted to bespoke requirements
    - providing a regular stream of editorial and 'advertorial' across different media
    - seeking the agreement of local businesses for them to use key messages and facts about the Exeter economy as introductory aspects of their presentations and promotional literature when attending or leading trade shows, conferences and business seminars
- seeking to provide or attract national and/or international conferences on themes and subjects that reflect the Exeter economy's strengths and/or aspirations

Targeted Marketing – key sectors to help grow the economy

4.3 A proactive element of activity will be the targeted marketing of specific sectors and companies therein. The proposed sectors are as follows:

Professional Services, Science and Technology
- Promote the area's reputation as a regional hub for professional knowledge based services which support local businesses, relocating employers and also provides services to investors seeking to procure services outside of London or from overseas
- Source of potential occupiers and new businesses within the local economy including on Exeter Science Park and SkyPark
- Contributes to an increase in knowledge based employment
- Source of knowledge based entrepreneurs

Retail
- Significant contributor to the city's regional reputation
- Draws in visitors and contributes to the development of additional hospitality employment and offers potential to generate trade with local suppliers

Government Departments and Quangos

- Contribute to:
    - the area's regional reputation for public administration
    - an increase in knowledge based employment
- Potential source of:
    - opportunities for collaborative or commissioned research with the University of Exeter
    - business for local suppliers

4.4 The activities and indeed the successful implementation of this Strategy is predicated on the active involvement and support of key players, local businesses, and industry sectors, some of which are already members of the Exeter Marketing Alliance

4.5 Key decision makers and influencers will be reached by drawing upon the market intelligence available though networks utilised by the diverse range of local businesses within the Exeter economy. The activities proposed are summarised below:

- generating warm leads from local businesses and key employers identifying potential firms/employers to approach to consider investment, expansion or relocation into the Exeter economy
- supporting property and site promotion by commercial agents
- delivering dedicated seminars to invited sector audiences to invest, relocate or expand in the Exeter economy
- working with local industry groups to promote investment, expansions and relocation and the securing of skilled workers into their sectors
- work with prominent local public sector employers to approach key government departments and contacts and generate opportunities to secure site visits for ministerial, VIP and senior civil servants

Perception Altering – challenging misconceptions

4.6 The Strategy proposes to use and build upon the connections of existing business relationships and aims to develop new working relationships, all aimed at influencing the perceptions and challenging misconceptions about the Exeter economy. This will be achieved by:

- use of social media – Exeter You Tube Channel, Exeter Facebook Page, Exeter Twitter Page to secure proactive 'chatter' within and across the networks about the Exeter economy (all interlinked with the new promotion and marketing website)
- hosting city and site visits
- work with the University of Exeter to capitalise on opportunities to create positive impressions of the Exeter economy at regular 'touch points' throughout the year with specific groups and visiting decision makers and influencers
- promoting the skills, supply chains and career opportunities of the Exeter economy
- parallel promotional activity by visitor and cultural marketing to demonstrate the quality of life and lifestyle on offer

5.0 LEAD MANAGEMENT AND PERFORMANCE MONITORING

5.1 It is proposed that the Council's Economic Development Service co-ordinates the implementation of the Place Marketing Strategy, supports the activities of the Exeter

Marketing Alliance, establishes the proposed performance indicators to measure success and continues to handle enquiries through its established business relocation and investment handling service.

5.2 To track progress, measure success and evaluate the effectiveness of the approaches in this Strategy, a range of performance indicators are proposed. For example, to assess the: effectiveness of targeted marketing activity, nature and volume of jobs created by local firms and inward investing employers, amount of commercial and public sector investment secured, the nature of media coverage in terms of positive perceptions of the Exeter economy and the city's reputation.

6.0 BRAND STATEMENT

6.1 Some cities use single short strap lines and others such as Bristol appear to use several strap lines to promote different aspects of their offer. For example, Bristol's messages convey the city as progressive, science based and creative that is the right place to be, connected in an urban, coast, and countryside environ.

6.2 Exeter has been using a number of approaches with the strap lines of 'regional capital', 'it's a capital city', 'city of science'. It also relates itself to Exeter and the Heart of Devon and for visitors, the 'Heart of Devon'. In so doing it is important to avoid brand confusion whilst conveying the important multi-faceted nature of the "product".

6.3 The following brand statement is currently proposed as the main promise of value from the Exeter economy. The promotional statement draws on for example, the local economy's success, its forward looking research activity from the University of Exeter and the work of the Met Office, the growth point developments, the green capital vision and the presence of innovative businesses. Alternatives are welcomed during this consultation period.

'Exeter – successful, forward thinking, innovative.'

6.4 The proposed approach complements the Heart of Devon Tourism Partnership promoting the quality of life and lifestyle of the area. It also avoids brand confusion, allowing both to sit together side by side and provides a rounded vision of Exeter and the Heart of Devon:

'Heart of Devon – city, coast, countryside.'

6.5 In addition, a range of strapline messages have been proposed in Appendix 5 of the Strategy. These underscore different aspects of Exeter's economy. They are set alongside existing imagery associated with 'Exeter it's a capital city' and also for 'Exeter and the Heart of Devon'.

6.6 The brand statement, imagery to be associated with it and additional strap lines have yet to be agreed.

7.0 CONSULTATION

7.1 The Council will formally consult with the business community and key stakeholders to seek their views and support for the Place Marketing Strategy. Consultees will be drawn from those groups indicated in Figure 1 of the Strategy together key employers and the Heart of the South West Local Enterprise Partnership.

7.2 Consultation will run over a 4 week period. Officers will collate responses and present the final proposed Strategy to this Committee in September 2012.

8.0 FINANCIAL IMPLICATIONS

8.1 The draft action plan identifies proposed budgets for each proposed activity across its 4 year time frame. Many of the actions listed are set at zero cost, relying on staff time and resources from within the Marketing Alliance.

8.2 The Economic Development Service currently has an annual marketing budget of £40,150. It is intended that the City Council contributes from this budget to the costs contained within the action plan

8.3 Members of the Marketing Alliance have indicated they might be able to provide in kind support through use of staff resources, skills, and access to some media networks. However, co-funding is required to support the implementation of the Strategy. The Exeter and Heart of Devon Growth Board have discussed this issue.

9.0 RECOMMENDATION that:

9.1 Members comment on the proposed priorities and approaches of the draft Place Marketing Strategy.

RICHARD BALL
ASSISTANT DIRECTOR ECONOMY

Local Government (Access to Information) Act 1985 (as amended)
Background papers used in compiling this report:
1. 'Development of a Place Marketing Strategy', Scrutiny Committee – Economy, 8 September 2011

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Place Marketing Strategy

Exeter Economy

2012 – 2016

Contents

1 Executive Summary

1.1 The Place Marketing Strategy's purpose is to help underpin the continued growth of the Exeter economy, broadly covered by Exeter, East Devon, Teignbridge, and Mid Devon, known locally as the Exeter and Heart of Devon Economic (EHOD) sub-region.

1.2 Cities act as the 'shop window' on the economic performance and attractiveness of a locality. A city projects impressions, images, and messages about itself and its hinterland that can have an important impact on the perceptions of influencers and decision making investors. The promotion and marketing of the local economy – EHOD – would benefit from a direct association around a consistent powerful and effectively delivered set of messages portraying the area as part of the Exeter economy.

1.3 The proposed strategic aim is:

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

1.4 To reinforce Exeter's strong market position it is proposed that this Place Marketing Strategy has four objectives, designed 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 area's reputation for having a leading combination of retail, heritage and cultural experiences in an outstanding environment
- attract and retain skilled workers and graduates

1.5 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.

1.6 The city is a large magnet for employment. It has the 10th highest level of jobs density across all of the UK's local authority areas providing a large concentration of jobs for its hinterland. Between 2008 and 2010, Exeter was in the top 10 nationally for job creation; all achieved whilst 76% of all locations throughout Great Britain saw job losses.

1.7 The UK Competitiveness Index confirmed that Exeter has seen the greatest improvement in competitiveness against all other UK locations. With further significant economic and developments planned and the increased availability of employment land the Exeter economy is in a strong market position to grow further.

1.8 Research undertaken by Experian supports this belief. It 'looked at evidence for growth between 2010 and 2012 in every local authority area in England'. The research shows that 'Exeter in particular performs well in the region and is within the top 10 local authority districts in England' possessing businesses with high growth potential.

1.9 Exeter has a strong regional offer – its commercial, administrative, and retail strengths as a regional capital are complemented by the:

- world class University of Exeter and its research strengths
- Met Office's focus on climate change
- Growth Point and other extensive high value employment opportunities

1.10 This offer together with the area's reputation for outstanding quality of life, positions the Exeter economy as one of **the** locations for attracting knowledge based businesses. On this basis it is proposed that the city economy is branded: '*Exeter – successful, forward thinking, innovative*.' This approach would complement the Heart of Devon Tourism Partnership strapline emphasis on the quality of life and lifestyle offer portrayed by the offer of '*City, coast & countryside*.'

1.11 Whatever is said and promoted about the Exeter economy must be credible and mark it out as **the** place to be. It is not just about sharing and using as far as possible the same logo and a range of strap lines. These have yet to be agreed. The Exeter economy needs as many key local players as possible working together in a common direction in developing and promoting the city. It is about agreeing and sharing common messages and maximising the opportunity for visibility.

1.12 The Exeter Marketing Alliance was the first step along this journey that now requires commitment at the highest level to strategic collaboration across a wider range of participants from across the public and private sector.

1.13 Collaboration towards the implementation of this Strategy should bring the following dividends, securing:

- new and additional investment in employment sites, accommodation and professional services
- new entrepreneurs and business start-ups
- relocation, expansion or consolidation of employers providing new employment, annual injections of expenditure into the local economy and provide opportunities for local firms to supply products and services
- the occupation of Exeter Science Park and SkyPark and other key employment sites
- the attraction of additional skilled workers and potentially increase the retention of graduates
- additional retail provision and an increase in the volume and expenditure

of visitors and shoppers

1.14 In terms of the city's characteristics, Exeter has an array of assets that potentially mark out the City's distinctive offer. However, some appear to be largely 'hidden' beneath people's general perception. Misconceptions need to be countered. The qualities and strengths of the Exeter economy need to be promoted.

1.15 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. The Exeter economy provides that certainty and confidence.

1.16 The marketing programme proposed recommends three broad categories of activity aimed at raising awareness of the offer through promotional activity, targeting sectors considered by the Exeter Marketing Alliance as important and challenging misconceptions.

1.17 The Strategy proposes to establish a range of 'vehicles' to raise awareness of the Exeter economy. These include:

- establish an effective promotion and marketing website
- produce an investment prospectus
- provide or attract national and/or international conferences reflecting Exeter economy's strengths and/or aspirations.

1.18 These sectors offer the best opportunities to help local businesses prosper, create jobs and also to grow the Exeter economy. The sectors recommended, which contribute to Exeter's regional capital reputation are:

- Professional, Scientific and Technology sectors
- Retail Sector
- Public Sector

1.19 For the targeted marketing and development of the proposed sectors the intention is to draw upon the market intelligence and networks nationally and internationally available from local businesses. This should result in a steady flow of warm leads to follow up. It is the intention of this Strategy to:

- work much more closely with commercial agents on the promotion of property and sites
- deliver bespoke seminars to invited sector audiences
- work with local industry groups enabling them to promote investment, expansions and relocations that benefit their sector.

1.20 To influence perceptions and challenging misconceptions about the Exeter economy the Strategy proposes to use and build upon the connections of existing business networks and develop new working and social media relationships.

1.21 It is proposed that Exeter City Council's Economic Development Service co-ordinates the implementation of the Place Marketing Strategy, supports the activities of the Exeter Marketing Alliance, establishes the proposed performance indicators to measure success and continues to handle enquiries through its established business relocation and investment handling service.

2 Introduction

2.1 Exeter is the principal economy west of Bristol (see Appendix 1 for more information). In the last decade Exeter has outperformed most locations across the UK for job creation, featuring in the top 2% for employment growth. Growth statistics show that Exeter's job creation outperformed all other cities in the South West and achieved comparable job growth on par with Cardiff, Edinburgh, and Belfast.

2.2 The Exeter economy has seen significant investment over the past decade and a pipeline of further investment, over £1bn, is underway. Exeter alone is a strong city, with GDP running at around £3.6bn per annum.

2.3 The UK Competitiveness Index 2010, the latest available, 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, the Exeter economy is in a strong market position to grow further.

2.4 Research undertaken by Experian entitled, 'BBC Local Growth Research' (February 2012) supports this premise. The research 'looked at evidence for growth between 2010 and 2012 in every local authority area in England', demonstrating that Exeter and the Heart of Devon saw above average business growth in these 2 years. 'Exeter in particular performs well in the region and is within the top 10 local authority districts in England' possessing businesses with high growth potential. Such businesses are defined as 'young, small but rapidly expanding growing firms with…entrepreneurial skills, [with an] appetite for business risk and [an] international outlook'.

2.5 The Exeter economy is made up of sub-regional and interdependent local economies broadly covered by Exeter, East Devon, Teignbridge, and Mid Devon, known locally as the Exeter and Heart of Devon Economic (EHOD) sub-region.

2.6 The Place Marketing Strategy's purpose is to help underpin the continued growth of the Exeter economy and attract and retain investment, new businesses, and skilled workers. All of which, much like the attraction of visitors to the area benefits local businesses across the city, coast, and rural hinterland of the sub-region. Income will be generated for local businesses through construction activity, trading and staff expenditure in the local economy.

2.7 Cities act as the 'shop window' on the economic performance and attractiveness of a locality. References to the Exeter economy in the Strategy should be taken as being synonymous with the area's characteristics and attributes that make up EHOD. Exeter as a place name provides a platform to recognise the collective offer of the local economy.

3 Strategic Aim

3.1 The following aim is proposed for the Place Marketing Strategy:

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

4 Strategic Objectives

4.1 The following objectives are proposed; these also act to define the success criteria upon which the performance of the Strategy and that of the Exeter economy can be assessed. 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 area's reputation for having a leading combination of retail, heritage and cultural experiences in an outstanding environment*
- *attract and retain skilled workers and graduates*

5 Strategic Collaboration

5.1 There is a need now more than ever for collaboration and commitment to joint approaches to promotion and marketing. A number of organisations and local authorities including the Heart of the South West Local Enterprise Partnership (LEP) have a vested interest in the Exeter economy having a high profile, and a strong and positive image.

5.2 In order to maximise the opportunities to influence and change perceptions of key decision makers and influencers, there is a need to promote and market the area on the principle of 'all' seeking to 'speak with one voice.' Consequently, there will be a need to gain consensus around the approach, nature, and manifestation of the brand and promotional activity.

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

5.4 The Exeter Marketing Alliance (see Appendix 2) was formed to help shape the Place Marketing Strategy, deliver activities, and influence change in internal (within the area) and external perceptions. It was the first step along a journey that requires strategic collaboration across a wider range of participants from across the public and private sector.

5.5 Collaborative activity requires a range of proposed participants representing sectors and interest groups to:

- sign up to the Place Marketing Strategy's aims and objectives
- actively pull in the same direction
- adopt and adapt key messages to suit their market sector and customer base
- contribute staff and financial resources to successfully implement the Strategy

5.6 Collaboration towards the implementation of this Strategy should bring the following dividends, securing:

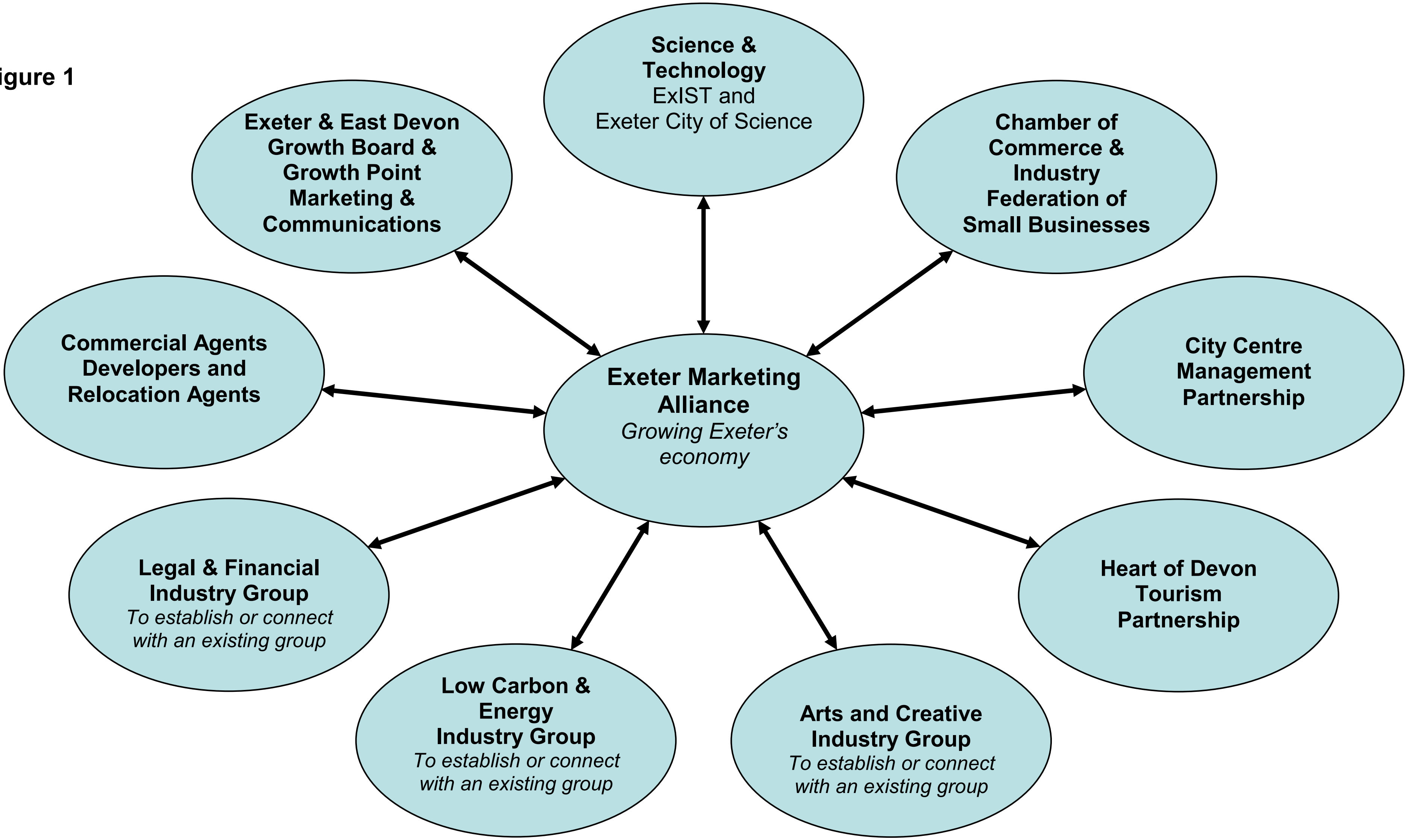
- new and additional investment in employment sites, accommodation and professional services
- new entrepreneurs and business start-ups
- relocation, expansion or consolidation of employers providing new employment, annual injections of expenditure into the local economy and provide opportunities for local firms to supply products and services
- the occupation of Exeter Science Park and SkyPark and other key employment sites
- the attraction of additional skilled workers and potentially increase the retention of graduates
- additional retail provision and an increase in the volume and expenditure of visitors and shoppers

5.7 Figure 1 provides an outline of the groupings of proposed 'industry' participants that are required to work as a part of collaborative activity under the umbrella of the Exeter Marketing Alliance. Tourism development and promotion would remain with the successful Heart of Devon Tourism Partnership.

5.8 The role of each group is defined by their own 'industry sector'. However, each group would be expected to work autonomously to promote growth in their area of activity and where relevant work with others to target and attract businesses to relocate and or expand within the Exeter economy.

5.9 The Exeter and Heart of Devon Growth Board is an appropriate conduit to endorse and help drive agreement on the Strategy and secure commitment at the highest level on collaboration from the range of participants.

Figure 1


Science & Technology
ExIST and
Exeter City of Science
Exeter & East Devon Growth Board & Growth Point Marketing & Communications
Chamber of Commerce & Industry
Federation of Small Businesses
Commercial Agents Developers and Relocation Agents
Exeter Marketing Alliance
Growing Exeter's economy
City Centre Management Partnership
Legal & Financial Industry Group
To establish or connect with an existing group
Heart of Devon Tourism Partnership
Low Carbon & Energy Industry Group
To establish or connect with an existing group
Arts and Creative Industry Group
To establish or connect with an existing group

6 Place Marketing the Exeter Economy

The significance of a 'sense of place'

6.1 Cities project images and messages about the locality and the hinterland. 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 and its interdependence with the towns and villages that surround it, and the presence of well-known people and renowned organisations, products or services.

6.2 The Exeter economy 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 here.

6.3 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.

6.4 Increasingly cities and their surroundings use their quality of life assets when competing for investment, business, visitors, and students. The Exeter economy must continue to pay attention to those aspects that are the foundations of its character and continue to improve the use of space and its natural assets.

6.5 For example, the report for Exeter, 'A City Centre Vision for a Green Capital' (June 2011) defines a long-term strategic and physical vision for the centre of the city. 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, as with 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.

6.6 Whatever said and promoted about the city and its surroundings must be credible. Overall, the messages will form the picture, the basis of the Exeter economy's story and contain its character and the offer to be conveyed to prospective customers that the area wants and needs to attract.

6.7 Such characteristics help to provide the area with a 'sense of place'. The Exeter economy 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 the area. 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.

Market Position

6.8 In 2012 Exeter's retail offer was ranked 30th within Great Britain. John Lewis opens a new store in the city in 2012. Exeter aspires to be positioned as the 25th largest retail catchment following the completion of the mixed use redevelopment of the Exeter Bus and Coach Station.

6.9 Compared to other notable locations, Bristol, Plymouth, Swindon, Cambridge, Oxford, and Warwick, Exeter has the highest percentage of businesses with £1m+ turnover and also the highest percentage of businesses trading for 10+ years. Importantly, as a place for knowledge based businesses, Exeter has a particular concentration of employment across professional, legal, scientific, engineering, and technical activities and as a hub for professional services in the region offers comparable quality to London competitors but at greater value for money.

6.10 The University of Exeter, recognised as being in the top 1% across the world for international research is going from strength to strength. It has recently been recognised as a member of the Russell Group of Universities. 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.

6.11 The multi-million pound public and private sector investment partnership which is working well together within the Exeter and East Devon Growth Board, a 20 year major economic development programme, is indicative of the economic strength and the confidence in the area (see Appendix 3).

6.12 In terms of sector led growth, research undertaken by Experian anticipates growth over the short and medium term within the financial and business service sector. This is particularly good news for the Exeter economy which has many strengths within these activities.

6.13 Experian define activities and services making up this sector as including:

- media activities
- computing and information services
- finance, insurance and pensions
- real estate
- professional services
- administration and supportive service activities

6.14 In pursuing a growth agenda it is important to assess the particular strengths of Exeter's economy as it will help local partners decide where they need to devote time and energy to make best use of finite resources.

6.15 In terms of the area's strengths and weakness, as portrayed by examples in the table over leaf, the Exeter economy has an array of brand and cultural assets that potentially mark out the area's distinctive offer as a place to be.

6.16 However, a number of assets may well be beneath the radar of many beyond the local area. Making them more visible would reinforce Exeter economy's reputation. Developing a nationally recognised iconic symbol or project that grabs and holds national and international attention would place the Exeter economy at the forefront of people's minds.

Strengths		Weaknesses
Visible Brand Assets - *University of Exeter* - *The Met Office and Hadley Centre for Climate Change* - *Pennon Group, EDF Energy, Flybe, Supercat, Goodridge, Graphic Plc, ATASS, Heathcoat Fabrics, Centrax, Thomson Reuters, Peninsula College of Medicine and Dentistry,* - *Princesshay 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 Memorial Museum* - *City's heritage* - *Film location for German TV series* - *Proximity to – Dartmoor and Exmoor National Parks, Sea and Jurassic Coastline, RSPB Reserves, AONB's* - *Exeter Rugby and Football Clubs, Exeter Racecourse and other sporting facilities* - *Exeter Phoenix, Northcott Theatre, Corn Exchange, 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* - *Hub of professional and knowledge-based services* - *New high growth potential 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 located in the Exeter economy*	- *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 Sector Strengths

7.1 Exeter has relatively higher proportions of employment than across England and Wales in the following broad industrial sectors:

- Construction
- Health
- Motor Trades
- Professional, Scientific and Technical Services
- Property
- Public Administration and Defence
- Utilities

7.2 The majority of Britain's economic growth comes from knowledge based services (KBS)…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[1].

7.3 Exeter has the second highest concentration of knowledge based services (KBS) within the South West, slightly behind and second only to Bristol. Within Devon, EHOD accounts for 55 per cent of employment in KBS; the city alone accounts for over 31 per cent of such employment in the County.

7.4 Exeter's particular concentration of KBS employment in comparison to Bristol, Plymouth, Swindon, Cambridge, Oxford and Warwick and England and Wales, is in:

- Legal activities
- Engineering activities and related technical consultancy
- Other professional, scientific and technical activities

7.5 Overall, net employment across EHOD grew by some 7,600 between 2008 and 2010, with Exeter accounting for 4,500 placing Exeter in the top 10 for employment growth across Great Britain. Whilst some sectors lost jobs, most notably the public sector, growth in the Exeter economy was largely down to the following sectors:

- Construction
- Accommodation and food services
- Wholesale and retail trade and repair of motor vehicles
- Professional, scientific and technical
- Education
- Transportation and storage

[1] The Work Foundation (2011) 'Britain's Quiet Success Story - Business Services in the knowledge Economy'

7.6 Research undertaken on behalf of the Employment and Skills Board forecast employment growth as a result of the developments in the Exeter and East Devon Growth Point to be over 26,000 jobs spanning a 20 year period within the following sectors:

Sectors	**Forecast employment growth**
Business and Professional Services	11,000+
Retail and Hospitality	3,500+
Transportation and Logistics	3,000+
Food and Drink	1,000+
Construction and Building Services	900+
Advanced Engineering	1,000+
Bioscience and Health	1,000+
Low Carbon & Environmental Goods & Services	1,000+

8 Target Opportunities

8.1 The intention is to focus on the following sectors for achievement of the Strategy's objectives:

Professional Services, Science and Technology

- Promotes the area's reputation as a regional hub for professional knowledge based services which supports local businesses, relocating employers and also provides services to investors seeking to procure services outside of London or from overseas
- Source of potential occupiers and new businesses within the local economy including on Exeter Science Park and SkyPark
- Contributes to an increase in knowledge based employment
- Source of knowledge based entrepreneurs

Retail

- Significant contributor to the area's regional reputation
- Draws in visitors and contributes to the development of additional hospitality employment and offers potential to generate trade with local suppliers

Government Departments and Quangos

- Contributes to:
    - the area's regional reputation for public administration
    - an increase in knowledge based employment
- Potential source of:
    - opportunities for collaborative or commissioned research with the University of Exeter
    - business for local suppliers

Professional, Science and Technology Sectors

8.2 Businesses and investors in science and technology away from Exeter may well be unaware of the:

- acclaimed research strengths and the connections and support for industry available from the University of Exeter
- range of support provided through the Innovation Centre under the umbrella of Exeter Business Support for start ups and young high growth businesses
- breadth and depth of skills, knowledge, and technology available locally promoted by the recently founded Exeter Initiative for Science and Technology (ExIST).

8.3 Like Bristol, Exeter needs to be seen as a hub for professional services in the region offering comparable quality to London competitors but at greater value for money.

8.4 It is essential to show clearly how well connected Exeter is through its communications and business networks and the realisable bottom line profit and loss benefits of operating here.

8.5 To secure growth the Exeter economy needs to attract:

- companies and start-ups with high proportion of investment in intellectual property
- hi tech industries, research and development focused and precision manufacturing
- information technology based companies with significant bias towards development and/or use of hardware, software including cloud-based computing for the provision of services for their clients, e.g. smartphone and wireless apps., for business and individual consumers
- regional offices/headquarters of large multi-national firms to enhance Exeter's regional capital profile and also to use their presence and connections to facilitate access to overseas markets and provide opportunities for local businesses to provide their goods and services
- the interest of sophisticated global investors such as Blackstone, New Enterprise Associates (NEA), Accel and Hansberger
- firms starting up or specialising in –
    - biosciences and food security
    - medicine and healthcare
    - climate change adaptation and the environment
    - data management and statistical predictive analysis
    - new functional materials and photonics
- marine-related employers (Exeter has above average regional levels of employment in this sector)

Retail Sector

8.6 The High Street retail offer across the UK is exposed to the vagaries of consumer shopping habits and the growth in on-line shopping. However, Exeter's position in the national retail hierarchy is significant. It contributes to the city's reputation as a regional capital and as a place offering a high quality of life. With a retail catchment of over 1 million people, Exeter's potential to expand its offer is a genuine and realistic opportunity.

8.7 As a result of delivering planned developments in the city, more people will choose the city as a shopping destination. The physical size of the retail offer will increase over the next 5 years, widening employment opportunity, and creating more local career pathways for employees.

8.8 Other aspects of Exeter and the surrounding area provide real opportunities for the retail sector and attract visitors, residents, and businesses into the Exeter economy and helps create a sense of place. These are accommodation and food services and the range of art and culture available. The latter plays a particularly important role in helping to shape the distinctiveness of the area's offer, offering opportunities for people to join in, to socialise, to create and engage in community life.

8.9 To secure growth and expansions in the retail sector, there is a need to:

- demonstrate long term sustainable planning for growth in the local, regional and visitor markets, with measurable targets against which progress can be assessed
- set out within the new City Centre Strategy what is happening now, the planned activities for the next 5 years including what will be done to help the sector grow and improve customer service and the opportunities that will bring
- influence London and Bristol based agents representing major retailers to visit/revisit Exeter and provide them with information to put the city on the required location list for retailers
- support the development and promotion of the tourism, arts and cultural sectors

Public Sector

8.10 Government Departments and Quangos have hitherto been on the direct marketing activities of the local authorities co-ordinated by the City Council within EHOD. There have been some successes, most notably, the public and private sector partnership that secured the relocation of the Met Office.

8.11 With the forecast loss of some 750,000 jobs nationally across the public sector, it might not be considered that an appropriate target to pursue actively.

8.12 However, with the public sector's drive on cost control there may well be opportunities to secure those that seek to achieve consolidation of operating efficiencies by their deployment around the country. The question of further relocations of public sector organisations out of the South East to save on long term costs to the public purse have been raised more frequently in recent months.

8.13 Whilst relocation activity has been quiet of late, previous research undertaken on behalf of the then Labour Government, the Lyons Review suggested that Exeter is in a strong position to attract further and/or replacement public sector employment.

8.14 To be in a position to seize opportunities to secure growth, relocation and/or consolidations in the public sector, the Exeter economy needs to:

- demonstrate the:
  - quality and accessibility of specific sites and buildings and the tangible cost benefits of being here
  - range of career paths available across the sector within the Exeter economy
- work with prominent local public sector employers to approach key government departments and contacts and seek to secure a steady flow of Government VIPs and Civil Servants for Exeter economy site visits

Attracting entrepreneurs and skilled workers

8.15 The University of Exeter and the local FE colleges reinforce the position of Exeter as a place to live, work, study in, and visit. Continuing to attract students and retain their knowledge and expertise also adds to the mix of cultural activities generated by them. Moreover, they are a source of potential graduates to recruit or start up their own businesses.

8.16 Often skilled, creative, and/or young people are crucial for helping to drive growth in a local economy. These people are highly mobile and discerning in choosing their locations. It is critical they are attracted to Exeter to study, secure employment, or start up their own business to help spur growth.

8.17 Their decision making is shaped by the quality of place; they will have particular interest in the cultural landscape, the ambience, and buzz of life in the city and the diversity and distinctiveness of the locality.

8.18 To attract them to the Exeter economy, there is a need to:

- promote the range of career opportunities to create the perception of the area as a place where graduates/skilled employees can readily stay and progress their career

- promote the lifestyle of studying, living and working here including the breadth of the arts, culture, leisure, sporting, outdoor activities and adventure and easy access to natural environments

Entrance Points

8.19 In addition, attention should be given to how entrance points into the area are developed, managed, maintained, and promoted. They play an important role in how the area is perceived and experienced. Examples of entrance points are set out below.

- websites, social media platforms, car parks (public and private), bus and railway stations, the airport, hotels, conference centres, business seminars and signage

9 What are the Exeter economy's selling points?

9.1 The following should be adopted as a guide to how the area is promoted and marketed. This will require Exeter Marketing Alliance participants and supportive local employers to integrate the following messages into their own promotional vehicles.

9.2 Demonstrating the Exeter economy's:

- track record of success, creating employment
- prominent/outstanding organisations and achievements
- clarity of purpose – local policies and visions
- future growth and employment creation prospects
- commercial outlook
- location and its connectivity to London and overseas

9.3 Messages need to convey:

- its strength and success as a commercial business location – open for business
    - with world class innovative 'know how' in science, technology and expert knowledge attractive to those businesses seeking to be part of the local cluster and as a place providing rewarding careers for skilled workers
    - with a top flight retail offer attractive to new retail investment
- busy 'forward thinking' location that is
    - accessible and connected - closer than you think
    - delivering on its growth agenda – its commercial outlook is excellent providing confidence in the local economy
    - forward thinking green capital vision
- the size and quality of the workforce and the pool of labour
- quality of life and the extent of the area's lifestyle offer –
    - as a good place for graduates and entrepreneurs
    - making it easier to recruit and retain key staff;
    - which provides employment opportunities for partners and members of the family

Background information – supporting the offer

9.4 There will be a need to provide supporting information that promotes:

- the central and accessible location in the region including rail and road links to London, and the Midlands and hub International Airports (door to door times)
- the area's competitive operational costs: e.g. rents and rates for premium office accommodation and lower median workplace salaries
- quality, availability and accessibility of sites and premises
- Exeter's performance against other cities – employment and business growth, sector specialisms, presence of foreign owned companies
- the area as a hub for professional services in the region offering comparable quality to London competitors but at greater value for money
- the area as a premier quality location for major and brand-led retailers
- the capacity of local supply chains to meet the needs of the target sectors
- quality of HE and FE sector, state and private schools
- natural environment, culture and nightlife and 'things to do'
- hotels, bars and restaurants
- housing and eclectic mix of urban, rural and coastal settings
- opportunities to –
    - implement management and organisational change
    - project new image and identity
    - enhance intra communication and that with external business networks
    - improve work environment and performance of staff

Positive and negative perceptions

9.5 Research undertaken by partners with the Exeter Marketing Alliance indicates a range of both positive and negative perceptions of the local economy (see Appendix 4). It will be essential to counter negative perceptions and encourage positive perceptions in the mindset of key decision makers.

Defining a Brand

9.6 In order to confirm or develop a brand for the Exeter economy, like any other branded product or service, it is necessary to consider how its brand characteristics and 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.

9.7 The most significant considerations of decision makers and influencers have been identified.

For investors and businesses, their:

- primary considerations are for a strong local economy, the competitiveness of the location in terms of cost, site availability, accessibility and the pool of available skills

- secondary considerations are for a place with a reputation for local support, networking and friendliness, the quality of its environment and green credentials

For skilled workers their :

- primary considerations are for vitality and potential as a new place to work, employment and career opportunities and location in the country

- secondary considerations are strength of the local economy

9.8 The Exeter economy has a lot to offer. The area's best market position should see it focusing on promoting and marketing its brand on its track record as a regional capital, its assets and future growth plans as a city and sub-regional economy that offers certainty, confidence and credibility. The quality of life and lifestyle on offer within EHOD helps to round off the brand of Exeter's economy, confirming the area's sense of place, which is so important to raising and stimulating interest to locate and invest here.

9.9 Some cities use single short strap lines and others such as Bristol appear to use several strap lines to promote different aspects of their offer. For example, Bristol's messages convey the city as progressive, science based and creative that is the right place to be, a connected urban, coast, and countryside environ.

9.10 The City Council has been using a number of approaches with the strap lines of 'regional capital', 'it's a capital city', 'city of science', according to the intended audience or purpose. It also relates itself to Exeter and the Heart of Devon and for visitors, the 'Heart of Devon'. In so doing it is important to avoid brand confusion whilst conveying the important multi-faceted nature of the "product".

9.11 On the basis of for example, the city's economic success, its forward looking research activity arising from the University of Exeter and the work of the Met Office, the growth point developments, the green capital vision and the presence of innovative businesses, it is proposed that the city economy is branded and promoted as**:**

'Exeter – successful, forward thinking, innovative.'

9.12 This brand statement should convey the promise of added value from the essence of the character and brand assets of the Exeter economy.

9.13 The approach complements the Heart of Devon Tourism Partnership offer emphasising and promoting the quality of life and lifestyle of the area. It also brand confusion, allowing both to sit together side by side and providing a rounded vision of the place:

'Heart of Devon – City, coast, countryside.'

9.14 The current strap lines used to promote the Exeter economy are important messages that underpin the 'offer'. They are designed to appeal to specific audiences and sectors. In these fast changing times and advances in communication technology and techniques, active use of the different media and social media can influence perceptions. Provided credible statements are generated, there may be every reason to have a limited range of additional/alternative short-term strap lines that also capitalise on contemporary issues and concerns.

9.15 The issue of imagery to be associated with strap lines promoting the Exeter economy has yet to be decided. Appendix 5 contains copies of the imagery used for Exeter and also for Exeter and the Heart of Devon together with some proposed strap lines to promote the assets and characteristics of the area. Further discussion will be required to agree the preferred way forward with the imagery and agreed strap lines.

9.16 It will be necessary to underpin each strapline and key messages with a series of narratives that tells part of a story about the Exeter economy to attract interest from the Strategy's target audiences.

10 Marketing Programme

10.1 Members of the Marketing Alliance have offered to provide some staff resources towards the implementation of the Strategy. How this will be harnessed and utilised will be explored once the Strategy, the key messages and target audiences have been agreed.

10.2 The proposed activities to promote the Exeter economy are set out within the marketing programme. Three broad categories of activities are proposed as listed below.

Promotional – raising awareness of Exeter's offer

10.3 It is intended to establish a range of 'vehicles' to raise awareness of the Exeter economy as summarised below:

- establish a dedicated but extensively linked and regularly refreshed and updated promotion and marketing website incorporating the successful "fly-through" approach
- prepare an investment prospectus to be available electronically and in

hard copy
- create and place a regular flow of editorial and ‘advertorial’ across different media
- have a strong presence at trade shows and conferences attended by local businesses
- promote key messages at local sector business seminars
- seek to provide or attract national and/or international conferences that reflect the Exeter economy’s strengths and/or aspirations

Targeted Marketing – key sectors to help grow the economy

10.4 The intention is to use the market intelligence and networks nationally and internationally available from the diverse range of local businesses within the Exeter economy. The successful implementation of this Strategy is predicated on the active involvement and support of key players, local businesses, and industry sectors. Some are already members of the Exeter Marketing Alliance. The activities proposed are summarised below:

- generating warm leads from local businesses and key employers identifying potential firms/employers to approach
- work with prominent local public sector employers to approach key government departments and contacts and generate opportunities to secure site visits for ministerial, VIP and senior civil servants
- supporting property and site promotion by commercial agents
- delivering dedicated seminars to invited sector audiences to invest, relocate or expand in the Exeter economy
- working with local industry groups to promote investment, expansions and relocations and the securing of skilled workers into their sectors

Perception Altering – challenging misconceptions

10.5 The intention is to use and build upon the connections of existing business relationships and also develop new working relationships to influence perceptions and challenge misconceptions about the Exeter economy. This will be achieved by:

- use of social media – Exeter You Tube Channel, Exeter Facebook Page, Exeter Twitter Page to secure proactive ‘chatter’ within and across the networks about the Exeter economy (all interlinked with the new promotion and marketing website)
- hosting city and site visits which are effective measures to change perceptions and persuade a business to invest, expand or move
- work with the University of Exeter to capitalise on opportunities to create positive impressions of the Exeter economy throughout the year with target audiences
- promoting the skills, supply chains and career opportunities of the Exeter economy
- parallel promotional activity by visitor and cultural marketing to demonstrate the quality of life and lifestyle on offer

Generating leads for targeted marketing

10.6 In order to ensure a steady and increasing stream of prospects, the following sources need to be harnessed to generate potential leads:

- enquiries received by the City Council's EHOD on-line commercial property register
- the management of key business parks and employment sites
- foreign direct enquiries arising through the UKTI and LEP
- the market intelligence of the Marketing Alliance
- local business groups
- local commercial agents and their syndicated network of offices across the UK and overseas
- relocation and commercial agents/consultants in Bristol, Birmingham and London

Lead management

10.7 The Strategy proposes that Exeter City Council's Economic Development Service acts as the conduit for lead management. The Service has an established system to handle business relocation and investment enquiries for EHOD that supports the partnership with East Devon, Teignbridge, and Mid Devon district councils. In addition, the Development Service works with the Heart of the South West LEP and the UKTI in responding to and handling foreign direct investment enquiries.

10.8 It will be necessary from time to time to draw on the support of the Marketing Alliance to meet and greet and also introduce new arrivals into the business community to make sure their setting up is as trouble free as possible. As and when appropriate it will be important to make aftercare visits to companies.

11 Performance indicators

11.1 It is proposed that the following indicators are established to track progress, measure success and evaluate the effectiveness of the approaches.

Activity:

- type and number of employers targeted
- the number of investment and business relocation enquiries arising from collaborative activity

Outputs:

- the conversion rate from enquiry to: expansion, relocation, consolidation or start - up
- growth in size, type and turnover of business in the Exeter economy
- number and types of jobs created by local and inward investing firms (if available)
- change in Exeter's position in Great Britain's retail hierarchy
- through the Heart of Devon Visitor Strategy activities the number of visitors to the Exeter economy

Outcomes:

- the amount of commercial and public sector investment secured
- the type and number of new employers, and particularly more knowledge-based businesses and entrepreneurs secured into the economy
- through a Chamber of Commerce and Industry survey the trends in the number of skilled workers and recent graduates employed and the ease of attracting and retaining them
- value, amount and type of media coverage to assess perceptions of area's reputation for having a leading combination of retail, heritage and cultural experiences in an outstanding environment

Exeter Economy Marketing Programme Action Plan					
	Activity	**Timescale**	**Responsibility**	**Budget**	**Outcomes/Outputs**
Promotional – raising awareness of Exeter's offer					
1	Establish an effective website to promote the Exeter economy, its strengths, and opportunities for investment, start up, business relocations and skilled workers.	Year 1	Exeter City Council, partner local authorities in EHOD Exeter Marketing Alliance Growth Point Team	£15,000	Is viewed as the central contact for information and support for investors, businesses and skilled workers and use by media Enables the tracking of enquiries resulting from promotional and targeted marketing activity Enables the Exeter Marketing Alliance to secure easy access to key data, to share information with key contacts and also market intelligence with the City Council's Economic Development Service for follow up coordination of targeted marketing activity Links with other local websites, 3D Flythrough, Exeter Facebook Page, Exeter You Tube Channel and Twitter account to provide added credibility to key messages

Exeter Economy Marketing Programme Action Plan					
	Activity	**Timescale**	**Responsibility**	**Budget**	**Outcomes/Outputs**
2	Produce an area investment prospectus including setting out: - • what is happening now, the planned activities for the next 5 years and the opportunities that capture the key strategic development and investment opportunities around the city • outline plans to improve the economic environment and infrastructure required to support the growth generated by these opportunities	Year 1	EHOD local authorities, Growth Point Team and local commercial agents and developers	£5,000	Provides investors and business with information to stimulate their interest in the Exeter economy; Provides new business start ups with vision of emerging opportunities in the Exeter economy Encourages investment, start ups, expansions, and relocations into the Exeter economy.
3	Publish and make widely available details of support available and how it is coordinated locally to help 'businesses' move to the area	Year 1	Exeter City Council	£1,000	Provides easily accessible information in one place of the local partnership and soft landing support available; promotes confidence in the area's ability to assist major moves into the Exeter economy
4	Drawing on the PR support offered by members of the Exeter Marketing Alliance prepare and produce jointly editorial for professional and trade sector websites, magazines and national features in the 'broadsheets'	Year 1	Exeter Marketing Alliance Growth Point Team	£6,000	Promotes awareness of the strengths and attractions of the Exeter economy and raises profile to key decision makers and influencers; secures press coverage regionally and nationally
5	Drawing on the PR support offered by members of the Exeter Marketing Alliance use local radio with its London base to reach principally, skilled workers and develop and promote family friendly messages about the Exeter Economy	Year 2	Exeter Marketing Alliance	£4,000	Promotes awareness of the strengths and attractions to local audiences and reaches out to potential skilled workers, key decision makers and influencers in London; encourages an increase in start up, business and relocation enquiries
6	Work towards establishing an international conference in Exeter for key sector businesses, multi-nationals and governments which addresses a significant global issue of which the city has world class strengths and advertise a call for papers and speakers	Year 3	Leading key employers, University of Exeter	£40,000	Potential to put the Exeter economy on the radar of investors and businesses and could be promoted as a proxy iconic project; encourages an increase in start up, business and relocation enquiries; secures press coverage nationally and potentially internationally.

Exeter Economy Marketing Programme Action Plan					
Activity		Timescale	Responsibility	Budget	Outcomes/Outputs
Targeted Marketing – to help grow the local economy					
7	Generate regular flow of warm leads from range of business and commercial agent networks	Year 1	Exeter Marketing Alliance	£0.00	Increased opportunities to nurture direct interest in expanding, relocating and or consolidating in the Exeter economy; secures investment, expansion and relocations
8	Delivering small investment and relocation Exeter seminars twice a year to an invited sector audience in part identified by the business networks of the Exeter Marketing Alliance and hosted in Birmingham or London via Institute of Directors premises	Year 1	Exeter Marketing Alliance	£10,000	Opportunities to secures investment, expansion and relocations and also secure investment and growth of local professional and business services
9	Establish and/or work with existing industry groups linked to the Exeter Marketing Alliance to promote the collective offer from each group for investors, expanding and relocating businesses and skilled workers	Year 1	Exeter City Council working with local industry sector groups	£0.00	Secure investment and business relocations and expansions that assist local industry sector growth and the creation of local jobs; encourages skilled workers to see the Exeter economy as a place to work (links to the Exeter Facebook page)
10	Work with local commercial agents and developers to update promotional information on key sites and premises and assist them in bringing high profile investors and employers into the area	Year 1	Exeter City Council, EHOD Las, Exeter Marketing Alliance	£0.00	Ensures coherency of core messages about the Exeter economy; secures expansion and relocations.
11	Work prominent local public sector employers to approach key government departments and contacts and generate opportunities to secure site visits for ministerial, VIP and senior civil servants	Year 2	EHOD local authorities, Exeter Marketing Alliance , EHOD Growth Board, Heart of the South West LEP	£5,000	Secures consolidation and/or relocations of public sector employers

	Exeter Economy Marketing Programme Action Plan				
	Activity	**Timescale**	**Responsibility**	**Budget**	**Outcomes/Outputs**
	Perception Altering – challenging misconceptions				
12	'Recruit' additional high profile business ambassadors prepared to champion and talk about the strengths of Exeter through their national and international range of business connections	Year 1	Private Sector Partners in the Exeter Marketing Alliance	£0.00	Increase in capability to reach key decision makers and influencers; added credibility of messages received from trusted businesses; encourages investment, expansion and relocations
13	Influence London and Bristol based agents representing major retailers to visit/revisit Exeter and provide them with information to put the city on the required location list for retailers	Year 1	Exeter City Centre Partnership supported by the Exeter Marketing Alliance	£0.00	An effective means of changing perceptions; persuading some to consider the Exeter economy as a place to commit their client's resources; secures new and additional retail investment
14	Establish an Exeter You Tube Channel containing an array of 90 second video case studies of local businesses and key stakeholders produced by local creative media students	Year 1	Exeter College supported by Teignbridge District Council's film unit	£5,000	Showcase for local businesses; promotes awareness of business benefits of operating in Exeter economy; encourages an increase in start up, business and relocation enquiries
15	Establish an Exeter Facebook page targeted at attracting and influencing young skilled workers and entrepreneurs to study, stay and work or start a business in the Exeter economy and • promote the range of career opportunities in the Exeter economy • promote lifestyle through linking into information on the arts, culture, leisure, sporting, outdoor activities and adventure and the access to natural environments	Year 1	University of Exeter, Exeter College, Innovation Centre, Young High Growth Companies, State and Private Schools Heart of Devon Tourism Partnership	£3,000	Encourages young people and graduates to stay and work/start a business here; encourages a source of skilled and knowledge based labour to work for local employers; encourages interest from entrepreneurs to start up/expand/relocate to the Exeter economy

	Exeter Economy Marketing Programme Action Plan				
	Activity	Timescale	Responsibility	Budget	Outcomes/Outputs
16	Promote the skills and supply chains capability and capacity to support the current and growth needs of new and expanding businesses, particularly those in the science and technology sectors	Year 1	Exeter City Council Local Industry Sector Groups Chamber of Commerce & Industry, ExIST, EHOD Employment and Skills Board, Innovation Centre	£0.00	Provides necessary comfort and confidence to invest resources here; encourages start ups, expansions and relocations into the Exeter economy; provides information to feed into the Exeter Facebook page
17	Work with leading local and influential representatives and leading business people to secure speaking opportunities for them at key regional, national and international conferences, events, tradeshows and at locally delivered business seminars	Year 2	Exeter Marketing Alliance High Level Exeter Marketing Alliance Business Ambassadors	£0.00	Likely to be attended by key decision makers and influencers in target industry sectors; added credibility of messages received from trusted people and businesses; persuading some to consider the Exeter economy as a place to commit resources, expand and relocate
18	Arrange site visits with key decision makers and influencers from target sectors showing an interest in investing, expanding and relocating to the Exeter Economy	Year 2	Exeter Marketing Alliance High Level Exeter Marketing Alliance Business Ambassadors	£5,000	An effective means of changing perceptions and also of persuading an organisation to move; secures decision to invest, expand or relocate into the local economy
19	Build relationships with journalists and facilitate annual briefing sessions, site visits and easy access to information via dedicated website	Year 2	EHOD LAs. Press Communication Teams; Exeter and East Devon Growth Point	£1,500	An effective means of changing perceptions; secures press coverage regionally and nationally; promotes positive messages about the Exeter economy; encourages an increase in start up, business and relocation enquiries
20	Work with the University of Exeter to capitalise on opportunities to create positive impressions of the Exeter economy at regular 'touch points' throughout the year with specific groups: students, post-graduates, alumni and also from key decision makers and influencers that may form a proportion of visiting families on graduation days	Year 2	University of Exeter, Exeter City Council,	£1,500	Secures new and additional investment into the Exeter economy; encourages graduates to stay and work/start a business here; encourages a source of skilled and knowledge based labour to work for local employers; encourages expansion and relocation of businesses here

Exeter Economy Marketing Programme Action Plan					
	Activity	Timescale	Responsibility	Budget	Outcomes/Outputs
21	Capitalise on opportunities to promote key messages about the Exeter economy at a range of entrance points to generate positive perceptions of the Exeter economy: partner websites, social media platforms, car parks (public and private), bus and railway stations, the airport, hotels, conference centres and signage, business seminars	Year 3	Local and Highway Authorities and Local businesses, EHOD Growth Board; Exeter Marketing Alliance	£0.00	Provides additional outlets to promote information; encourages start ups, expansions and relocations into the Exeter economy

Appendices

APPENDIX 1

Key points about the Exeter economy

Did you know that Exeter…

1. is the principal economy west of Bristol

2. attracts between 700 and 1,000 enquiries every year from businesses looking to expand or relocate into its economy

3. has a retail offer ranked as one of Great Britain's top 30 retail catchments and is one of only 10 designated Retail Centres across G.B.

4. aspires to be ranked 25th largest retail catchments across Great Britain following the completion of the mixed use redevelopment of the Exeter Bus and Coach Station.

5. has above England and Wales average concentrations of employment in:

- construction
- utilities
- motor trades
- property
- professional, scientific and technical activities
  - legal services
  - other professional, scientific and technical activities
  - research and experimental development in social sciences
  - engineering activities and related technical consultancy
- public administration and defence

6. is a hub for professional services in the region offering comparable quality to London competitors but at greater value for money

7. is home to one of the world's top 1% of universities, one which is the 25th fastest growing business in the UK and actively works with industry and supports innovation and innovative businesses

8. is an easy place to make business connections

9. is a large magnet for employment, being ranked in 10th position overall across all of the local authority areas within the UK for providing a large concentration of jobs for its hinterland

10. from 2000 to 2009 was the 7th fastest growing city in the UK for job creation, which together with its economic area created over 34,000 jobs, outperforming cities like Edinburgh, Cardiff, Belfast, Sheffield and Manchester

11. continued to increase employment by 7,600 between 2008 and 2010, placing it in the top 10 nationally; all achieved whilst 76% of all locations throughout Great Britain saw job losses?

12. research undertaken by Experian entitled, 'BBC Local Growth Research' (February 2012) shows that 'Exeter in particular performs well in the region and is within the top 10 local authority districts in England' possessing businesses with high growth potential

13. will see a net increase of 26,000 jobs arising from the development of the Exeter and East Devon Growth Point. These are forecast to be in:

- 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
- Advanced Engineering – 1,000+ new jobs
- Bioscience and Health – 1,000+ new jobs
- Low Carbon & Environmental Goods & Services – 1,000+ new jobs

14. has over a billion pounds worth of private and public sector investment planned within the Growth Point to develop two regionally important employment sites, including Exeter Science Park and a new eco-friendly market town – Cranbrook

15. is an accessible city at the centre of the South West, is eight miles across, 2 hours from London by train, has two main railway lines to London, the Midlands and the North, and is only 10 minutes drive time to Exeter's International Airport?

16. is renowned for a high quality of life with easy access to an outstanding natural environment – the Exe Estuary, two moors – Dartmoor and Exmoor, rolling countryside, designated Areas of Outstanding National Beauty and internationally recognised coastlines

17. has a clear vision to further enhance its credentials by transforming its offer to be the green capital of the South West

18. has a 'can do' attitude and a workforce that is recognised as being loyal, hardworking, stable and versatile

APPENDIX 2

Current Representation on the Exeter Marketing Alliance (EMA)

- Exeter City Council
- East Devon District Council
- Devon County Council
- Science & Technology Reps Legal & Accountancy Reps
- Creative Design Reps
- Media Reps
- Retail Rep
- HE and FE Reps
- Exeter Chamber
- Growth Point Reps
- Exeter Airport Rep

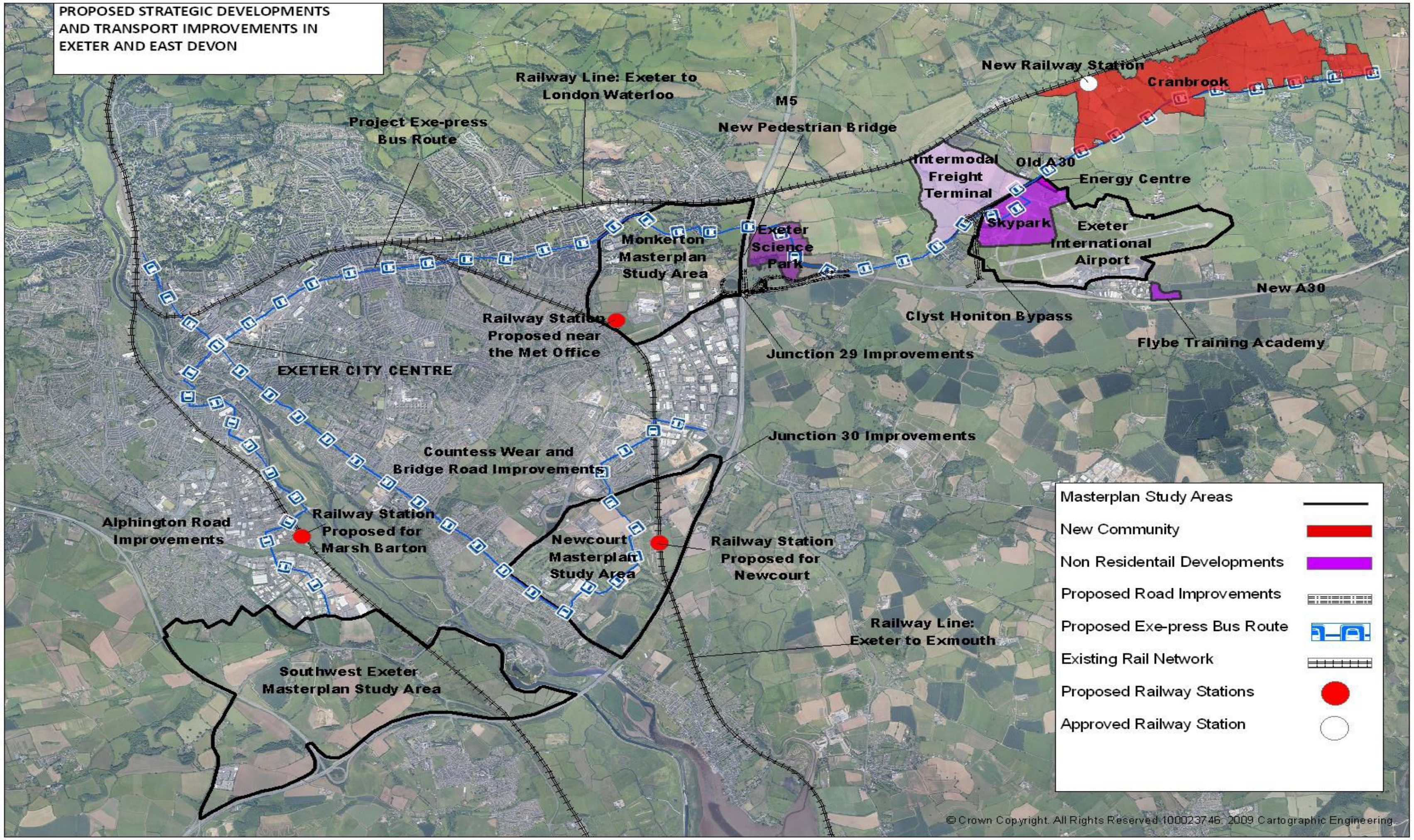
Gaps in Representation

- Flybe

Suggested additional representation arising from current EMA

- Landmark
- Land Securities
- Darts Farm
- Stovax
- Gregory Distribution
- Heart of Devon Tourism Partnership
- Commercial Agents and Developers
- Local Industry Sector Groups
- ATASS

Exeter and East Devon Growth Point



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Positive Perceptions

- is a different place from the rest of Devon and is thrusting, forward looking
- is entrepreneurial – a great place for entrepreneurs
- has very strong business networks – an easy place to make business connections
- is home to a top flight university: -
  - with a willingness to understand and work with industry and to support innovation/innovative businesses
  - attracting world class scientists
- possesses quality of life – a great place to raise a family, enjoy a wide range of activities
- has good schools and college
- is home to many leading edge businesses
- the sporting success of Exeter Chiefs
- is good at construction
- the Met Office attracts calibre employees and the presence of its super-computer adds to the perception of Exeter as a place for IT
- has a multilingual workforce
- good accessibility: 2 hours by train from London with mainlines to the Midlands and the North, an international airport with hub into and beyond Europe, motorway and prominent trunk roads in all directions
- offers immense advantages over other locations in the South West in terms of access and logistics
- the Airport promotes Exeter as a visitor destination – access to diversity of leisure experiences, shopping, coastal and rural areas
- great regional location for the South West
- cosmopolitan, racially diverse, good culture and retail offer – proximity to countryside and sea
- businesses can source ‘ most things’ they need
- Flybe is investing in engineering – attractive to other engineering and aerospace businesses
- potentially attractive to advanced manufacturing with links to the Science Park
- the Heart of Devon – 10 years on – is seen as a place to do business
- the Science Park, Skypark, Cranbrook, the Intermodal link all underline the fact that investment is being attracted to the area

Negative Perceptions

- larger ‘core’ UK cities being seen as a source of better services and support as the Government targets additional funding, greater autonomy and superfast broadband within them
- Bristol being seen as a ‘better’ place to invest, procure professional services and locate outside of London
- Exeter does not feature on the radar of some retailers as a priority location for investment: there is a nervousness from some brands in the retail sector about locations west of Bristol
- lack of understanding regarding how strong the area is economically relative to the rest of the South West
- Exeter being seen as too far away – some thinking its location is where Plymouth actually is
- distance and isolation: needs improvements to public transport and connectivity within the Region
- distance to customers and supply base
- Exeter being seen as affected by traffic congestion set in a rural backwater
- high costs – no competitive advantage
- low priority for R&D activities
- Does the Exeter economy have the ability to attract and retain key staff if starting up or relocating here and in particular meet the demands of the science and technology sector?
- concern that Exeter’s economy may not have a large enough pool of high quality skills to meet the demands of the science and technology sector
- lack of understanding regarding the quality of the workforce

Exeter

See examples of the logo, without a strapline overleaf. The current strapline, Exeter – ‘it’s a capital city’ could be used as one of several with the logo to convey the attributes and characteristics of the local economy.

Set out below is a list of existing messages and proposed additional ones in italics that could be associated with the ‘it’s a capital city’ image/logo under the main new approach to branding the city economy as **‘Exeter – successful, forward thinking, innovative.’**

The Heart of Devon logo with the strapline ‘City, coast & countryside’ is specifically for the visitor economy and thus should stay distinctive, whilst complementing the new proposed branding approach. However, there may be a case to remove the current image for the city of science and replace it with the ‘it’s a capital city image’ to avoid the risk of brand confusion.

Exeter It’s a capital city	Exeter the regional capital	Exeter city of science	*Exeter* *open for business*	*Exeter* *outlook excellent*
Exeter *closer than you think*	*Exeter* *creative* *with technology*	*Exeter* *beacon of knowledge*	*Exeter* *green capital*	*Exeter* *city, coast and countryside*

Exeter and Heart of Devon

Some may see the design as looking tired and in need of an update. It may be useful to maintain the sense of geography and centrality of the location. It would possible to use some but perhaps not all of the strap lines previously proposed. The following table proposes some alternative and adapted strap lines.

Exeter & the Heart of Devon *with a capital city at heart*	*Exeter & the Heart of Devon* *home of the regional capital*	*Exeter & the Heart of Devon* *a better climate for business*	*Exeter & the Heart of Devon* *open for business*	*Exeter & the Heart of Devon* *outlook excellent*
Exeter & the Heart of Devon *closer than you think*	*Exeter & the Heart of Devon* *creative with science & technology*	*Exeter & the Heart of Devon* *beacon of knowledge*		

EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY

31 MAY 2012

CAPITAL PROGRAMME MONITORING

1. PURPOSE OF REPORT

1.1. This report advises Members of the final position with regard to the 2011/12 capital programme for the Economy and Development Directorate.

2. INFORMATION AND ANALYSIS

2.1 This report provides a summary of the final position, with Appendix 1 containing a complete list of capital projects for the Directorate. The Appendix compares the final expenditure on projects for the year to the budgets and determines the carry forward to cover the deferred expenditure into 2012/13.

2.2 The right hand column in the Appendix provides comments in relation to the various schemes.

2.3. The following schemes should be noted:

- **City Centre Enhancements**

  Works to Gandy Street is now complete. Works to Northernhay Gardens is almost complete, but the remainder of this work is reliant on another contractor vacating the site. Works to Rougemont Garden Gate is to start in June 2012. The majority of this budget is to be used London Inn Square (Paris St/New North Rd/Sidwell St) which is due to start on site in June.

- **King William Street Car Park Refurbishment**

  Work has commenced on site for the second phase of the King William Street Car Park refurbishment and is on schedule for completion at the end of August 2012. The remainder of the budget for Phase 1 (£197,330) is to be used towards the London Inn Square improvements which are due to be carried out this year.

- **Science Park**

  The main site infrastructure is nearly complete and marketing activity will now step up. An application has been submitted to the Local Enterprise Partnership for funding from the Growing Places Fund to assist funding of the first Science Park building. Long standing governance issues in relation to legal agreements are close to resolution and the required legal framework for the Council's equity stake to be invested is close to being completed.

3 RECOMMENDATION

3.1 That Members note the contents of this report, and indicate whether they wish to receive further information on any particular issues.

KARIME HASSAN
STRATEGIC DIRECTOR

Local Government Act 1972 (as amended)
Background papers used in compiling this report:-
None.

CAPITAL PROGRAMME 2011/12

1	2	3	4	5	7	8	9	12	13
Project	**Code**	**Lead officer**	**Budget 2011/12 £**	**Spend for 11/12 (includes internal capitalised staff costs)**	**Budget 12/13 £**	**Beyond £**	**Value of estimated Deferred Expenditure into 12/13 £**	**Revised 12/13 Budget (Col 7 + 9) £**	**Project Progress Update (and contingencies employed/actions taken since last report, if project slippage/anticipated deferment/cost variance)**
Basin/Quayside *(redevelopment of canal basin; refurbished listed buildings; improved public access to area & continued activity on water)*	Z1139	MC	377,120	30,267	60,000		346,850	406,850	New Haven Road Outdoor Education Centre under construction by DCC. ECQT remarketing listed buildings and site at head of Basin. ECC will carry out a tree planting and seating scheme for Haven Banks in 2012 and may roll out further public realm improvements.
City Centre Enhancements	Z1116	RPS (Chris Westlake)	140,170	133,554	467,220	200,000	6,620	473,840	Gandy Street complete. Northernhay Gate practically complete, approx £1,500 worth of work still outstanding subject to another contractor vacating site; Rougemont Garden Gate works to start in June 2012. Remainder to be carried over. £458,000 allocated to London Inn Square (Paris Street/New North Road/Sidwell Street) to be spent 2012/13.
Corn Exchange Improvements	*Z1131*	*RB*	*7,550*	*2,441*			*5,110*	*5,110*	*Toilet refurbishment complete. Remaining monies required to address continuing water pressure problems.*
Corn Exchange - Haystack Lantern	*Z1216*	*RB*	*21,850*	*21,850*			*0*	*0*	*Works now complete.*
Cowick St Environmental Imps	Z1113	RPS (Paul Osborne)	100,000	0	100,000		100,000	200,000	Bridge cleaning and lighting, co-ordinated street furniture and signage, pedestrian improvements to front of St Thomas shopping centre. To be implemented in 2012/13.
137 Cowick Street	Z1208	MC (Terry Jackson)	147,690	113,839			33,850	33,850	The budget is made up of £108,637 of s106 money plus £22,076 from Age concern. Work is now complete, except for some landscaping at the front of the building, but Age Concern have been able to move in. There is retention of approx £4,000 to be paid back to Age Concern upon completion.
National Cycle Network	Z1107	DH	295,230	265,204			30,030	30,030	Schemes are continually being designed and constructed for DCC. We then invoice them for works plus 10% for fees throughout the year. Current budget includes latest payments from DCC including the Pinhoe Station Road scheme which is now complete.
Floodlighting	*Z1156*	*RPS (Andy Pye)*	*1,120*	*0*			*1,120*	*1,120*	*Bulk of budget frozen shortly after PMWG had agreed priorities for future work. The £1,120 represents residue of budget that was not frozen, and should be carried over in order to deal with any issues arising from installed schemes.*
Ibstock Environmental Improvements	*Z1407*	*MC*	*3,240*	*0*			*3,240*	*3,240*	*Monies retained for environmental consultant in the event of land transfer*
King William St CP Refurb Stage 1	Z1201	RDC (Steve Carnell)	36,870	34,540	195,000		2,330	197,330	Remainder carried over to 2012/13 for London Inn Square (Paris St, New North Road and Sidwell St improvements)

CAPITAL PROGRAMME 2011/12

1	2	3	4	5	7	8	9	12	13
Project	**Code**	**Lead officer**	**Budget 2011/12 £**	**Spend for 11/12 (includes internal capitalised staff costs)**	**Budget 12/13 £**	**Beyond £**	**Value of estimated Deferred Expenditure into 12/13 £**	**Revised 12/13 Budget (Col 7 + 9) £**	**Project Progress Update (and contingencies employed/actions taken since last report, if project slippage/anticipated deferment/cost variance)**
King William St CP Refurb Stage 2	Z1202	RDC (Steve Carnell)	46,450	63,192	875,000		(16,740)	858,260	Work has commenced on site and is on schedule for completion at the end of August 2012. Work progressed quicker than expected in 2011/12 so it has been necessary to bring back some of the 2012/13 budget that had been agreed as a carry forward in September 2011 to cover this expenditure.
Mincinglake / Northbrook Study	Z1242	DH (Peter Stewart)	82,100	73,784			8,320	8,320	Flow monitoring is ongoing. Any unspent money goes back to EA/DEFRA. DCC have funded an additional £25,000 of monitoring.
18 North Street Panelling	*Z1106*	*RPS (Andy Pye)*	*2,720*	*1,850*			*870*	*870*	*Panelling has been reinstalled; some publication and interpretation material remains to be completed. Project will be completed in 2012/13*
Planting Improvements in Riverside Valley Park	Z1408	RPS (Paul Osborne)	14,250	0			14,250	14,250	S106 money. On hold awaiting confirmation of EA Flood Alleviation Proposals.
Quay House Visitor Centre Improvements	*Z1135*	*RB*	*2,010*	*544*			*1,470*	*1,470*	*Residual work left from refurbishment last year now being completed. Expected to be completed by July 2012.*
Riverside Valley Park - Security Measures	*Z1254*	*DH*	*2,570*	*670*			*1,900*	*1,900*	*Balance remaining of section 106 contribution. Carry forward balance in case swift response is needed to a threat.*
Science Park	Z1150	RB	761,730	25,742			735,990	735,990	The main site infrastructure is nearly complete and marketing activity will now step up. Applications are being made to fund the first building.
Signage	Z1117	RPS (Paul Osborne)	32,650	1,054			31,600	31,600	RSL appointed to deliver three monoliths - to be located Sidwell St, Bedford Sq and St Thomas. To be installed by December 2012.
St Katherine's Priory Re-roofing	Z1265	DH	47,040	390	28,000		46,650	74,650	Tenders have come in over budget. Additional funding has been approved by Executive and work will start in September 2012.
Verney House Works from Stock Condition Survey	Z1259	MC (Tracy Woolgar)	47,270	2,273			45,000	45,000	Works to roof covering, window surrounds and edge protection nearly completed. Budget to carry forward into 2012/13 although a saving is likely to be declared.
Total			**2,169,630**	**771,195**	**1,805,220**	**200,000**	**1,398,460**	**3,123,680**	

EXETER CITY COUNCIL

**SCRUTINY COMMITTEE - ECONOMY
31 MAY 2012**

ECONOMY SCRUTINY REVENUE FINAL ACCOUNTS 2011-12

1. PURPOSE OF REPORT

1.1 This report advises Members of the overall financial performance of the Economy and Development Directorate for the 2011-12 financial year ended 31 March 2012.

2. INFORMATION

2.1 During the course of the financial year ending 31 March 2012, regular reports were made to this committee on the estimated revenue outturn.

2.2 As in previous years a technical adjustment to the accounts for pension contributions has been made in line with required accounting practice. Part of the change to International Financial Reporting Standards has meant that FRS17 is now known as International Accounting Standard 19 (IAS19). This amendment is reversed out to show the actual cost to the Council and therefore has no impact on the Council Tax. The treatment is similar to the way we account for capital charges, and the impact is shown for each management unit in the appendix to this report. The final figure for IAS19 is lower than budgeted resulting in an underspend of £85,651 against the budget in this committee. The variance shown against each management unit excludes this underspend in order to demonstrate the true position.

2.3 During the year, the Government issued a capitalisation directive to the Council allowing us to capitalise (and not charge to revenue immediately) up to £1 million of redundancy costs. Actual redundancy costs of £460,157 have been capitalised during the year, the amount relating to this committee is £255,393.

2.4 The final actual outturn has now been calculated and the report below highlights the major differences by management unit from the approved annual budget after adjusting for supplementary budgets and excluding the IAS19 variance. The total variation for the year shows a surplus of £336,585 against the budget, with a final surplus of £170,843 after accounting for transfers to and from earmarked reserves and revenue contributions to capital outlay (RCCOs).

2.5 The main variations by management unit are detailed below:

	£
2011-2012 REVISED ESTIMATE	**(2,131,690)**
LESS PLANNED MOVEMENT TO / (FROM) RESERVES	**(155,580)**
2011-2012 REVISED ESTIMATE AFTER PLANNED RESERVE MOVEMENTS	**(2,287,270)**

83A1 PROPERTY & ESTATES SERVICES (64,083)

The quarter three stewardship report advised that income across the portfolio was holding up in general. The year end figures show a 1.4% shortfall on the income budgets within the management unit.

There has been an underspend on the Asset Improvement and Maintenance budget (AIMS), this budget funds any required improvement and maintenance to council assets.

In addition, the savings anticipated on the various sub-contractor budgets and the service charge budget at Bradninch Place was achieved. However, these savings were partially offset by the insurance budget in respect of the property portfolio being exceeded.

Expenditure has been incurred in respect of repairs to various lease properties; this expenditure has been recharged to the lessee.

The support service recharge budgets are less than the annual budget, the significant underspends were in respect of the recharges from the Economy and Development Administration team, Engineering and Construction and Information and Technology. These underspends were partially offset by the recharge from Legal services exceeding the budgeted figure.

Income has been received due to the release of restrictive covenants; this income has been accounted for in the figures but has been used to finance capital expenditure.

83A2 TRANSPORTATION (51,766)

The variance in this management unit relates to the Council's Green Travel Plan. A surplus has been accumulated over a number of years. This surplus will be transferred to a newly created earmarked reserve and used to fund the revised Green Travel Plan.

83A3 CAR PARKING 37,836

Income from off street car park fees was 3.5% below the annual budget for the year, the income from season tickets was 14.1% below the budget at year end. This resulted in a shortfall of £220,970. The shortfall projected for the year in the previous stewardship report was £125,000. These figures confirm the continuation of the ongoing uncertainties with the economic climate and a weakness in consumer spending as previously reported.

Other income sources exceeded the annual budgets, the majority of this being due to additional income being received from a renegotiated lease in respect of car parking spaces in the Civic Centre car park.

There has been an underspend on the Asset Improvement and Maintenance budget (AIMS) within the management unit, the expenditure on utilities and premises insurance was less than the budgeted figure. These underspends have been partially offset by the previously reported overspend on National Non Domestic rates budget and the costs incurred in respect of the opening and closing of Council Car Parks.

The budget in respect of the maintenance of the equipment within the car parks has also been exceeded.

The shortfall of income and the additional expenditure detailed above has been offset by savings on the employee budgets due to a number of vacant posts within the Management Unit.

The Residents Parking Scheme which was provided by the council on behalf of Devon County Council showed a surplus of income over expenditure in the year. The provision of this service by ECC ceased with effect from the 1st November 2011.

83A4 ECONOMIC DEVELOPMENT (37,380)

Employment costs are less than the budget due to a vacant post. The savings being made on Salaries, National Insurance and Superannuation budgets.

Savings have been made on support service recharges, with the recharges from Information Technology and Directorate Administration being less than the budgeted figure. A small saving has also been made on transport costs.

83A5 FESTIVALS & EVENTS 11,333

Costs have been incurred in respect of the Olympic Torch Event; a budget has been funded in 2012-13 for the event however some unavoidable expenditure was incurred in this financial year.

There was a small overspend on the budgets allocated for the various festivals and costs have been incurred in respect of pay protection following a restructure, this has resulted in an overspend on employment budgets.

The above overspends have been partially offset by a saving on support service recharge budgets.

83A6 TOURISM 23,011

The expenditure in respect of travel and attraction tickets has exceeded the annual budget; the additional expenditure has been covered by the income received from the sale of the tickets to the public.

The expenditure in respect of support services and transport was less than the budget for the year.

The above mentioned additional income has also resulted in the income received in the year being above the budgeted figure.

There has been an overspend on pay budgets with the overtime, superannuation and enhancement budgets being exceeded; this additional expenditure has been partially offset by a saving on national insurance and the budget allocated for casual staffing.

83A8 DISTRICT HIGHWAYS & FOOTPATHS (19,204)

Income has been received in respect of an insurance claim, this income has offset the additional expenditure incurred and the recharges to this management unit for support services are less than the annual budget.

There has been an underspend on the electricity budget in respect of street lighting for which the council is responsible.

The capital charges budget has been exceeded with the depreciation figure being more than budgeted.

83A9 BUILDING CONTROL 12,617

The Building Control fee earning account is budgeted on a cost recovery basis. The income from building control fees was less than budgeted meaning the break even position was not achieved at year end. The deficit on the account was £15,680.64; this figure will be funded from the building control earmarked reserve.

There are savings on various expenditure budgets with the pay, supplies and services and support service recharges budgets all being underspent.

83B1 LAND DRAINAGE (17,650)

The expenditure on the sub-contractor budget within the management unit is less than the annual budget.

Expenditure has been incurred on property protection measures for three properties; this expenditure has been grant funded by the Environment Agency and any balance by the property owner.

83B2 ADMINISTRATION SERVICE 2,285

Employment costs are 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 have been recharged back to the various management units within this committee and reported within the individual management unit.

83B3	**DIRECTOR ECONOMY & DEVELOPMENT**	2,906

There was small overspend on pay budgets within the management unit.

This has been partially offset by savings on various supplies and services budgets and the support service recharge budget.

83B4	**ENGINEERING & CONSTRUCTION**	5,700

The cost of the Engineering and Construction team is recharged back to the various services which it undertakes work in the year.

There were underspends on the supplies and services, support services and pay budgets in the year. This saving has been recharged to the management units where appropriate and reported where necessary.

83B5	**PLANNING**	(65,188)

The income budget in respect of planning fees was reported as expected to be achieved at year end in the quarter three stewardship report. The year end figures show that planning fee income exceeded the budget by 6.75% (£30,356).

Other income sources also exceeded the budget with pre-application fees exceeding the budgeted amount; additional income was received in respect of legal fees.

Additional expenditure has been incurred due to costs awarded against the council in respect of a planning appeal at Hill Barton Farm. The additional expenditure has been partially offset by a saving on the sub-contractor budget and various supplies and services and transport budgets.

The support service recharge budgets were underspent with the recharges from Legal Services, Engineering & Construction and Economy and Development Admin Team being less than the budgeted figures.

The expenditure in respect of Planning Delivery has exceeded the budget; this expenditure will be funded by a transfer from the Planning Delivery earmarked reserve.

A transfer from the Local Development Framework earmarked reserve has also been made to fund the additional expenditure in this area.

The income received in respect of Habitats Assessments has been transferred to an earmarked reserve to fund any future expenditure.

83B6	**CONSERVATION**	(32,494)

The underspend in this management unit relates to the Asset Improvement and Maintenance budget (AIMS); a one year funded AIM priority has not been completed and a request to carry forward this budget will be made.

83B7 ARCHAEOLOGICAL FIELD UNIT 141,926

Year end income and expenditure figures show the cost of closure was £141,926. This figure is less than the projected figure of £268,421.

However, within the reported figures is an underspend of £69,381 on the AFU archiving budget which has been transferred to an earmarked reserve to enable any outstanding archiving work to be completed.

Therefore the actual cost of closure of the unit is £211,307.

83B8 MAJOR PROJECTS 16,734

The variance in this management partially relates to a provision for receipt of a grant. The grant was not received in the year and therefore the provision for the grant has been removed.

The remaining variance relates to in year expenditure on major projects; this expenditure has been funded by a transfer from an earmarked reserve.

83B9 MARKETS & HALLS (297,459)

The income in respect of livestock auctions and the use of car park areas was reported to be expected to exceed the budgets for the year. Year end income figures show this is the case with the income budgets being exceeded by 37.6% and 107.7% respectively.

Income budgets in general were achieved with the income received from Open Air markets also significantly exceeding the budgeted levels. Expenditure on employment costs in the management unit are less than the budget with savings being made on National Insurance and Superannuation budgets.

The Asset Improvement and Maintenance budgets within the management unit are less than the budgeted figure, with the service and maintenance element being significantly less than the annual budget. Savings have also been made on sub-contractors and utility budgets, these savings have been partially offset by an overspend on the premises insurance budget.

A saving has been made on the National Non Domestic Rate Budgets at the Livestock Centre and Exeter Corn Exchange.

The Corn Exchange event promotion budget was overspent at year end. This overspend was more than offset by the income generated from the events staged.

The support service recharge budgets are also less than the budgeted figures.

83C1 WATERWAYS (29,134)

A saving has been made on the employment budgets in the management unit due to the retirement of the Canal

Manager.

The budget in respect of the Harbour Revision Order has not been fully spent in the year.

The saving on the employment budgets will be partially offset by an overspend in respect of the cost of marine insurance, consultants fees and maintenance costs of the canal.

83D1	**MISCELLANEOUS CODES**	29,500

The variance in this management unit partially relates to invoices written off in respect of damage to cabling by a contractor during the redevelopment of Princesshay.

Negotiations have been ongoing for a number of years and an agreed settlement was made in this financial year.

The remaining variance is in respect of a recharge from the Engineering and Construction team.

2011-2012 FINAL OUTTURN	**(2,709,506)**
IAS19 VARIANCE	**(85,651)**
ADJUSTED OUTTURN	**(2,623,855)**
UNPLANNED TRANSFERS TO/(FROM) RESERVES	**116,742**
REVENUE CONTRIBUTION TO CAPITAL OUTLAY	**49,000**
TOTAL NET EXPENDITURE	**(2,458,113)**

3. **RECOMMENDED** that Scrutiny Committee – Economy note this report.

ASSISTANT DIRECTOR FINANCE

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

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SCRUTINY COMMITTEE - ECONOMY
OUTTURN

APRIL 2011 TO MARCH 2012

ANNUAL BUDGET	SUPPLEMENTARY BUDGET	REVISED BUDGET	CODE		OUTTURN	OUTTURN VARIANCE	IAS19 VARIANCE	ADJUSTED VARIANCE
£	£	£			£	£	£	£
(2,601,490)	0	(2,601,490)	83A1	PROPERTY & ESTATES SERVICES	(2,673,147)	(71,657)	(7,574)	(64,083)
81,680	1,500	83,180	83A2	TRANSPORTATION/CONCESSIONARY FARES	31,414	(51,766)		(51,766)
(3,378,150)	0	(3,378,150)	83A3	CAR PARKING	(3,354,604)	23,546	(14,290)	37,836
654,900	43,370	698,270	83A4	ECONOMIC DEVELOPMENT	654,113	(44,157)	(6,777)	(37,380)
207,930	0	207,930	83A5	FESTIVALS & EVENTS	218,021	10,091	(1,243)	11,333
444,250	0	444,250	83A6	TOURIST INFORMATION	462,831	18,581	(4,430)	23,011
26,000	0	26,000	83A7	ARCHAEOLOGY IN EXETER	26,000	0		0
354,790	0	354,790	83A8	DISTRICT HIGHWAYS & FOOTPATHS	335,586	(19,204)		(19,204)
65,470	0	65,470	83A9	BUILDING CONTROL	72,585	7,115	(5,502)	12,617
129,070	0	129,070	83B1	LAND DRAINAGE	111,420	(17,650)		(17,650)
0	0	0	83B2	ADMINISTRATION SERVICE	0	0	(2,285)	2,285
0	0	0	83B3	DIRECTOR ECONOMY & DEVELOPMENT	0	0	(2,906)	2,906
0	0	0	83B4	ENGINEERING & CONSTRUCTION SERVICES	0	0	(5,700)	5,700
1,147,700	0	1,147,700	83B5	PLANNING SERVICES	1,063,303	(84,397)	(19,209)	(65,188)
66,660	18,000	84,660	83B6	CONSERVATION	52,166	(32,494)		(32,494)
118,070	29,300	147,370	83B7	ARCHAEOLOGICAL FIELD UNIT	281,356	133,986	(7,940)	141,926
0	0	0	83B8	MAJOR PROJECTS	16,734	16,734		16,734
80,580	3,000	83,580	83B9	MARKETS & HALLS	(219,328)	(302,908)	(5,449)	(297,459)
345,680	30,000	375,680	83C1	WATERWAYS	344,201	(31,479)	(2,345)	(29,134)
			83D1	MISCELLANEOUS CODES	29,500	29,500		29,500
0								
(2,256,860)	125,170	(2,131,690)		**NET EXPENDITURE**	(2,547,850)	(416,160)	(85,651)	(330,509)
(155,580)	0	(155,580)		**PLANNED MOVEMENTS TO / (FROM) RESERVES**	(161,656)	(6,076)	0	(6,076)
(2,412,440)	125,170	(2,287,270)		**NET EXPENDITURE AFTER PLANNED RESERVE MOVEMENTS**	(2,709,506)	(422,236)	(85,651)	(336,585)

UNPLANNED TRANSFERS TO / (FROM) EARMARKED RESERVES		
83A9	BUILDING CONTROL	(15,681)
83B5	PLANNING	29,422
83A2	TRANSPORTATION	34,122
83B7	AFU	69,382
83B8	MAJOR PROJECTS	(503)
REVENUE CONTRIBUTIONS TO CAPITAL OUTLAY (RCCO)		
83A1	PROPERTY & ESTATES SERVICES	49,000
	OUTTURN AFTER ADJUSTING FOR MOVEMENTS ON RESERVES ETC	**(2,458,113)**
	REVISED BUDGET	**(2,287,270)**
		(170,843)

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

Agenda Item 13

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