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 17 JANUARY 2013**, 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 November 2012.

3 **DECLARATIONS OF INTEREST**

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

4 **LOCAL GOVERNMENT (ACCESS TO INFORMATION) ACT 1985 - EXCLUSION OF PRESS AND PUBLIC**

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

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

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

A period of up to 15 minutes will be set side 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.

## MATTER FOR CONSIDERATION BY SCRUTINY COMMITTEE ECONOMY

7 **REPORT OF THE EXETER AND EAST DEVON LOW CARBON TASK FORCE DISTRICT HEATING NETWORKS IN EXETER**

To consider the report of the Chair of the Exeter and East Devon Low Carbon Task Force - *report circulated* 1 - 6

## CAPITAL PROGRAMME, FEES AND CHARGES AND ESTIMATES

8 **BUDGET ESTIMATES 2013/14**

To consider the joint report of the Strategic Director (KH) and Assistant Director Finance – *report circulated* 7 - 42

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| Appendix 3 | Revenue Estimates |

## MATTER FOR CONSIDERATION BY THE EXECUTIVE

9 **DRAFT CITY CENTRE STRATEGY FOR EXETER 2013 - 2022**

To consider the report of the Assistant Director Economy - *report circulated* 43 - 70

## MATTERS FOR CONSIDERATION BY SCRUTINY COMMITTEE - ECONOMY

10 **UPDATE ON THE EXETER VISITOR STRATEGY 2012 - 2016**

To consider the report of the Assistant Director – Economy – *report circulated* 71 - 92

11 **SUPPORT FOR SMALL BUSINESSES**

To consider the report of the Assistant Director Economy- *report circulated* 93 - 106

12 **UPDATE ON PROGRESS FOR DEALING WITH UNEMPLOYMENT IN EXETER**

To consider the report of the Assistant Director Economy – *report circulated* 107 - 114

## DATE OF NEXT MEETING

The next **Scrutiny Committee - Economy** will be held on Thursday 7 March 2013 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 Crow (Chair), Brock (Deputy Chair), Baldwin, Bialyk, Bull, Choules, Crew, Lyons, Mottram, Pearson, Prowse, Robson and Wardle

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**EXETER CITY COUNCIL**

**SCRUTINY COMMITTEE – ECONOMY**
**17 JANUARY 2013**

**REPORT OF THE EXETER AND EAST DEVON LOW CARBON TASK FORCE**
**DISTRICT HEATING NETWORKS IN EXETER**

## 1.0 PURPOSE OF REPORT

1.1 This report advises Members of recent progress in establishing heat networks (also known as district heating) in the Exeter area and of the potential for a significant expansion of such networks.

## 2.0 BACKGROUND

2.1 Members will be aware that a heat network and Combined Heat and Power (CHP) plants provide a very efficient means of generating heat and electricity which overcomes the inherently wasteful use of energy associated with conventional power stations. Up to 60% of the input energy used in conventional power stations is currently lost in the conversion process and there are further losses through transmission over many miles to local customers. The carbon advantages of CHP, arising from their much greater efficiency in the use of input energy, are such that CHP is one of the preferred parts of a comprehensive low carbon strategy. Because the UK faces the prospect of needing to invest up to £200 billion in energy infrastructure in the next 20 years, it is important that appropriate long term investment decisions are taken now which can address spiralling energy prices and excess dependency on energy imports. Moreover, investment in such technology has been recognised by the CBI as being a prime driver of much needed economic growth (see their recent report 'The Colour of Growth').

2.2 A heat network is already operating as part of the Cranbrook scheme. Eventually, there will be a 75 km network of pipework, carrying heat from a CHP plant at Skypark and serving all of the dwellings in the new community and Skypark. The agreement to deliver district heating was a product of public sector leadership, tough bargaining and quite significant grant aid from the Homes and Communities Agency and the three local authorities. Future roll outs of CHP and district heating will need to rely on the first two of these but without the benefit of the third. There is however the prospect of limited grant aid through the Regional Growth Fund. The primary mechanism which proactive local authorities have used in facilitating the expansion of District Heating has been through the establishment of Energy Service Companies (ESCOs), often in conjunction with a private sector partner. An ESCO is seen by these authorities and, indeed by their private sector partners, as a vehicle for taking the lead in long term investment in a market which is not currently regulated by OFGEM – the energy regulator. The merits of local authority participation are that they can help reduce scheme risk – because they are key project partners – and thereby enable schemes to proceed with private sector funding, despite having less commercial rates of return. From citizens' perspectives, public sector involvement also helps guarantee that the 'public good' is represented. The report below outlines recent progress in taking forward District Heating (DH) initiatives in Exeter.

## 3.0 DISTRICT HEATING DEVELOPMENTS IN EXETER

3.1 The City Council's approved Core Strategy has a range of policies which set out how low carbon development should be delivered. There is a particular emphasis on CHP and district heating in Core Policy 13, with decentralised energy networks being seen as the preferred solution within large scale developments, particularly for the strategic allocations as Monkerton, Newcourt and Alphington/SW Exeter. The most progress has been achieved at Monkerton where some 2000 dwellings are expected to be built over the next decade or so. Here, the Low Carbon Task Force and Growth Area team have worked closely with EoN to bring forward proposals for the area. Meetings with the key landowners have been very positive and a formal proposal now rests with them for decision. One of the principal elements in reducing risk with the scheme is guaranteeing that a site is made available for a CHP plant. Devon County Council's Executive agreed at its meeting on 14 November that it would make sites available within its ownership at Monkerton for a temporary and for a (later) permanent CHP plant. Other work is proceeding to ensure that planning conditions for individual applications are consistent across the whole area and can ensure the effective installation of a heat network across a number of ownerships. Indeed, planning for the long term has also led to the specification of a CHP plant and heat network that can link developments on both sides of the M5 which will make for a more economic and efficient energy solution. As the development at Monkerton is new build only, there is no obvious need for a leading role for the local authority in an ESCO. The ESCO in this case, if the deal is successful, would be an EoN Company. It is clear however that the developers see the involvement of the local authority as being important for the longer term for householders who the developers feel will want some form of collective representation for dealing with EoN over the lease life for the district heating network.

3.2 The second main focus of the Task Force and Growth Area Team's work has been on what is generically termed the City Centre heat network. This network would serve a number of existing larger heat users as well as new development and is therefore more complex than the Cranbrook/Skypark or Monkerton schemes. Members may recall that the City Council and Land Securities commissioned a piece of work in 2010 which established that a city centre CHP and district heating network focused on the bus station site and key developments along Heavitree Road would be likely to be a viable scheme. Members will also be aware that the Energy from Waste Plant now under construction at Marsh Barton had a 'best endeavours' clause included (at the City Council's request) within the planning consent (issued by DCC, as waste management authority). This obligated DCC to ensure that best endeavours were made to use the energy from the Marsh Barton Plant. The default operation of the EfW plant is to produce electricity only with an overall efficiency in the order of 20%. However, if the plant exports heat to a heat network the overall efficiency could improve to 60%. "Best endeavours" is therefore a powerful incentive for the use of heat. There has been close co-operation with DCC over the last year in seeking to ensure that the EfW contractor (Viridor/Tiru) does fulfil its best endeavours obligation. One further change in the 'landscape' since 2010 is that the RD&E now has a substantial requirement for investment in heating and has a strong commitment to providing low carbon energy systems. Putting these elements together has resulted in four partners commissioning detailed engineering costings and financial evaluations for a range of potential heat networks from specialist consultant Parsons Brinkerhof, working with Northcroft. The partners are the City Council, Devon County Council, the University and the RD&E. That work is close to completion and will be reported more fully to Members later in the Spring. The following paragraphs summarise the key emerging evidence and conclusions.

3.3 There are a number of significant heat users who could be served by a heat network. The challenge is to reach a view on which combination of users presents a viable starting point for an ESCO to sign up those heat users and construct a core heat network. It is worth pointing out that experience from other cities, such as Southampton, is that systems have often started with only a small core of customers and have expanded from that base over time. In Exeter, the key potential target customers would be:

- the bus and coach station re-development
- the four sites for new student accommodation in the city centre
- Waitrose – which already has a section 106 contribution to facilitate DH connection
- John Lewis
- the Civic Centre
- the St Luke's campus
- Heavitree Hospital
- the RD&E
- County Hall
- Matford Business Park
- the south west Exeter urban extension

3.4 There are a number of other sites whose heat requirements have been calculated in order to see what optimum routeing and length a potential heat network should have. The study has also assessed options for energy centre locations in the city centre and at the RD&E, as well as using the heat from the EfW to drive a substantial part of the system. The latter could produce a very large amount of heat – equivalent to around one tenth of Exeter's current gas demand at a relatively low heat price (in the order of 1p per kWh – which is one third of the gas equivalent). As highlighted above, it would also take the EfW plant from being around 20% efficient to up to 60% efficient and in the context of the national policy to dramatically reduce carbon emissions, use of heat from the EfW plant therefore seems to be a proposal which is worth expending considerable collective effort to help deliver. Whilst this would be a significant environmental gain, it also needs to be an economic one too. Thus, the core of the technical and financial evaluation by the consultants is to see which network options have the best returns. The emerging results indicate that a network based on the City Centre/Heavitree Road/Wonford corridor has the best result, but that one which linked across the river to the EfW plant would also produce a positive rate of return, assuming the current level of government support for renewable heat continues. It should be added that, in the latter case, demand would be such that a heat network would be powered by a new energy centre and by the EfW plant – with the former acting as a back up for the latter, as no EfW plant has 100 % availability.

3.5 With regard to implementation, the consultants set out the key attributes of ESCOs which have been established elsewhere to facilitate implementation of heat networks. The involvement of local authorities is seen as positive by the consultants and by the industry because it is viewed as a valuable means of reducing risk. Access to lower cost borrowing is seen as a key advantage, as well as co-ordination of the consent process which crosses a range of boundaries – planning, highways and environmental health. Local authorities are also seen as key partners for the very practical reason of using their general powers to enable heat main installation. In a number of cases, ESCOs have been established with significant local authority involvement and whilst some have continued with full control (e.g. Woking), others have reduced and sometimes eliminated their participation over time (e.g. Southampton). Several other local authorities – Sheffield, Leicester and Birmingham – are now looking at strategic heat network expansion through ESCOs in which they have an equity stake.

3.6 It should be noted that DCC's Cabinet have approved the establishment of a District Heating Group, comprising core stakeholders, to take this work forward. They have also agreed to carry out work on the principle of establishing an ESCO and that soft market testing is undertaken, once the consultants' work is completed.

**4.0 NEXT STEPS**

4.1 The study will be completed later in January and will be reported to Members a little later in the Spring. It is apparent that a viable scheme for a significant heat network is likely to emerge and that one which also uses the waste heat from the EfW plant is also expected to be viable. The establishment of an ESCO with public sector participation is believed to be the most effective way forward in delivering the city centre scheme and collaboration with other public bodies the best way of delivering the necessary leadership. Members are asked to support officer participation in this work and to report back on progress later in the Spring.

4.2 Whilst the principal focus of the heat network proposals has been the significant carbon reduction benefits that will arise, there is an important Economy dimension to such developments. It has recently been highlighted by the CBI in its report 'The Colour of Growth' that the low carbon economy could be a real engine of growth in Britain. Although some people have argued that we can't afford to address green issues in current economic conditions, the CBI is unequivocal: 'the business response is definitive and emphatic: green is not just complementary to growth, but a vital driver of it'. The UK's green business economy is worth over £120 billion a year and a recent Regen SW report showed that the south west has been a major beneficiary of this and has good prospects for further expansion. For Exeter, an expanding low carbon energy network will mean less exposure to international volatility in energy supply and prices (through greater efficiency in fuel use and the expanded use of biomass) and the advantage of a more resilient local supply in a situation where en energy supply gap may open up nationally in future years. This developing infrastructure will help support the inward investment message for the City.

**5.0 RECOMMENDATIONS**

5.1 It is recommended that Members:

(i) note the progress on negotiations for a CHP plant and heat network at Monkerton;

(ii) endorse the principle of developing a detailed proposal for an ESCO to deliver a City Centre heat network through a District Heating Group;

(iii) approve joint working with other public sector bodies in the Growth Area to devise a viable scheme for this network;

(iv) approve market testing for this network to establish the likely level of private sector interest; and

(v) support the commissioning of a city wide Energy Strategy.

**JOHN RIGBY**
**CHAIR, EXETER AND EAST DEVON LOW CARBON TASK FORCE**

**Local Government (Access to Information) Act 1972 (as amended)**
***Background papers used in compiling this report:-***
1. The Colour of Growth, Confederation of British Industry, 2012

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**EXETER CITY COUNCIL**

**SCRUTINY COMMITTEE – ECONOMY**
**17 JANUARY 2013**

**ESTIMATES 2013/14**

## 1. INTRODUCTION

1.1 Attached are the draft estimates for 2013/14, which were discussed at an informal meeting of Scrutiny Committee - Economy on 13 December 2012.

1.2 This report outlines the strategic framework within which the estimates have been prepared, changes in accounting practices, which affect all estimates and detailed reasons for any significant changes in the Management unit estimates.

1.3 The budget has been amended to reflect the new management structure. However the savings target for services, have in many cases been included as a one line saving to reflect the fact that the detail has yet to be finalised.

## 2. BUDGET FRAMEWORK

2.1 With regard to inflation, an overall allowance of £300,000 has been set aside for next year. This includes an assumption with regard to increases in pay and increases for utility costs and contracts being offset by increases for fees and charges. For the following three years an annual inflation allowance of £300,000 has also been included for planning purposes. The inflationary assumptions that have been included for next year are as follows:

| | |
|---|---|
| • Pay Award | 1.0% |
| • Pay – Increments | 0.5% |
| • Electricity | 8.0% |
| • Gas | 20.0% |
| • Oil | 12.0% |
| • Water | 5.1% |
| • Insurance | 3.0% |
| • Rates | 2.0% |
| • Fuel | 6.0% |
| • General Inflation | 0.0% - see para 2.2 below |
| • Income (excluding car parks) | 2.5% |

2.2 As a means of finding efficiency savings many non-pay budgets will again not be fully increased for inflation. There will be some exceptions to this in particular where there are ongoing contractual arrangements in place and where the Council has to meet the full price increase e.g. insurance and fuel. Recently released figures show that the rate of Consumer Prices Index (CPI) inflation in the UK remained unchanged at 2.7% during November. Retail prices index (RPI) inflation, which includes housing costs, fell to 3% during November, down from 3.2% in October.

2.3 With regard to interest rates the Bank of England has continued to put the base rate of interest on hold at only 0.5% since March 2009. Most analysts are predicting that interest are likely to remain at their historically low levels in the short term with perhaps only a modest increase towards the end of the next financial year. The low levels of interest rates affect the City Council in different ways. On the negative side the Council has to assume low investment returns on cash deposits. Conversely, on the positive side, the low interest rates currently prevailing means that the cost of short term borrowing remains low. This is particularly important to the City Council now that it has to make use of borrowing in order to fund a significant part of its capital programme.

2.4 The Government has now announced the provisional two-year local government finance settlement covering 2013/14 and 2014/15. For Exeter the guideline figures are as follows:

- Formula Funding 2013/14 £7,811,885 (decrease 5.4% against 2012/13 'adjusted' formula funding)

The provisional settlement now indicates that in overall cash terms our 2013/14 formula funding will decrease by £445,922 against the 2012/13 'adjusted' formula funding amount of £8,257,807.

2.5 On 8 October 2012, the Chancellor of the Exchequer announced a £450 million fund for local authorities who decide to freeze council tax next year. If they do, councils, police and fire authorities will stand to receive £225 million of funding in both financial years 2013/14 and 2014/15, equivalent to raising their 2012/13 council tax by one per cent. In addition, in 2013/14 the Government will propose to lower the local authority tax referendum threshold to two per cent. After freezing its council tax for the last 2 years, the budget strategy for next year assumes that council tax will increase by 2%, which will raise an extra £96,000.

2.6 The New Homes Bonus is designed to create an effective fiscal incentive to encourage local authorities to facilitate housing growth. The scheme provides local authorities with a New Homes Bonus grant, equal to the national average for the council tax band on each additional property and paid for the following six years as an un-ring-fenced grant. There is also an enhancement for affordable homes. Whereas previously DCLG has allocated additional funding for the scheme in 2011/12 and 2012/13, this is no longer the case from 2013/14 onwards with funding for the scheme being 'top-sliced' from mainstream grant funding.

2.7 To date the Council has received New Homes Bonus of £389,165 in 2011/12, £1,322,664 in 2012/13 and is expecting to receive a further £2.3 million in 2013/14. The Executive has previously determined how the New Homes Bonus funding will be allocated, with 30% and 50% of the funding going towards community projects and major infrastructure respectively after a top slice for capacity building and neighbourhood planning.

2.8 The Council has previously decided not to use any of its New Homes Bonus allocation to fund any of its revenue budget services. Members may however wish to consider using part of the New Homes Bonus funding in order to meet some of the Council's additional revenue costs that have arisen as a result of more homes being built e.g. more refuse bins to collect, more streets to keep clean etc.

2.9 It is expected that the available resources for the General Fund Capital Programme (other than borrowing) over the next 5 years will total about £3.3 million and the capital programme that can be funded other than by borrowing is therefore still quite substantial. In terms of the General Fund, the currently approved capital programme and proposed new bids total almost £22.2 million over the next 4 years with a resultant borrowing requirement of £18.9 million. The current extra revenue cost of borrowing are £50,000 for each £1 million that is borrowed which means the future borrowing costs of the Council's capital programme are significant and must be met within the Council's overall revenue budget. The Capital Programme must therefore be continually reviewed with a view to reducing the programme wherever possible. With regard to proposed new capital bids, approval must be limited to those that are only absolutely essential. New bids should only be successful if they meet strict criteria such as meeting a statutory or health and safety requirement, or if there is a compelling business case to show that they will save costs or generate extra revenue in the future. A list of the proposed new schemes for Scrutiny Committee Economy is attached at Appendix 1.

2.10 The changes in respect of 2013/14 Fees and Charges for the budget are included at Appendix 2.

## 3. REVENUE BUDGET SAVINGS

3.1 The Medium Term Financial Plan currently indicates that the savings required next year are £890,000 with further savings required in future years. It is anticipated that the savings required for next year will be met from the current programme of structural change and service rationalisation. The required savings over the medium term are set out in the table below:-

3.2

| Year | Required Savings £000 |
|---|---|
| 2013/14 | 890 |
| 2014/15 | 653 |
| 2015/16 | 665 |
| 2016/17 | 649 |
| **Total** | **2,857** |

## 4. KEY REVENUE ESTIMATE CHANGES PROPOSED FOR 2013/14

4.1 The revenue budgets are attached at Appendix 3. The proposed budgets reflect a combination of budget increases and savings and the key changes are as follows:

### 83A1 PROPERTY & ESTATES SERVICES

Income estimates in respect of Commercial and Miscellaneous Properties have increased due to a number of leases being renegotiated in the year.

There are increases in a number of areas with the income estimates for High Street, Little Castle Street and Sidwell Street all increasing. However, these increases have been partially offset by a reduction in the income estimates in respect of South Street and St Georges Retail Units and a small increase in the void allowance estimate.

The estimate in respect of the Asset Improvement and Maintenance programme (AIM) has reduced. The reactive repairs element of the AIM estimate and the departmental recharge from the Contracts unit has also reduced resulting in a saving.

There has been an increase in estimate to cover any potential trading loss that may arise at the Exeter Business Centre.

A saving has been made on various supplies and services estimates with reductions in the software licences and marketing estimates.

The Estates team undertake work for various services and the cost of the team is recharged based on anticipated work to be carried out in that financial year. The work that the team undertakes has altered and therefore the support service recharge estimate to this committee in respect of the Estates Team has reduced. The support service recharge estimates have been amended to reflect this change.

The change in workload will also result in an increase in the Estates team recharge to services that fall within the Community and Resources committee.

Other support service recharge estimates have also reduced with the Directorate Administration, Information Technology and Human Resources recharge to this management unit being less than the current year estimate.

**83A2 TRANSPORTATION**

A salary estimate in respect of the Business and Projects Manager has been funded. The estimate for the post was previously recharged via a support service recharge; therefore this estimate has been removed meaning a reduction in the associated support service recharge.

The support service recharge from the Economy and Development Administration team has been removed and the recharge from the Strategic Director to this service has also reduced.

**83A3 CAR PARKING**

The estimate for income has been increased by £500,000 to reflect the increase anticipated following the opening of the John Lewis car park, tariff changes and increased economic activity in the city. However, the estimated income from season tickets and Penalty Charge Notices has been reduced by £45,000 reflecting the income levels currently being experienced.

Estimated pay in the unit has been reduced as a result of the management restructure and reduced overtime costs.

The estimate for Asset Improvement and Maintenance (AIMS) charges in this unit has reduced by £20,220. In addition, the estimates for electricity (£16,000) and insurance costs (£13,000) have been reduced. However, the estimate for National Non Domestic Rates (NNDR) has increased by £35,000.

The recharge from Cleansing Services has been reduced by £14,000, which is offset by a £10,000 increase in the estimate for maintenance of pay and display equipment.

The estimate for corporate support service recharges has reduced by £20,000.

**83A4 ECONOMIC DEVELOPMENT**

A saving has been made on salary estimates due to a voluntary redundancy request being approved and a vacant post being deleted from the establishment.

The supplies and services estimates are less than the current year figure with a saving being identified within the general expenses element of this estimate.

The recharges to the management unit for support services has reduced with the estimates for Economy & Development Administration team, Strategic Director, Information and Technology recharges and the recharge from Estates Services all being lower than the current year estimate.

Income estimates have been reduced due to a change in the amount of external funding received from partners for City Centre Management.

**83A5 ARTS AND EVENTS**

The one off Olympic Torch Event estimate has been removed.

Other changes in this management unit relate to the merging of the cost centre for Vibraphonic into the renamed Arts and Events cost centre. In addition an estimate has been included to fund a small grant for the Analogue to Digital Music Show.

The support service recharges in respect of Information Technology and Civic Centre Room rental have reduced; various other recharge estimates have also reduced.

**83A6 TOURISM**

Changes to estimates in this management unit relate to support service recharges. The recharges in respect of Human Resources and Contracts unit are less than the current year estimate.

**83A8 DISTRICT HIGHWAYS AND FOOTPATHS**

The recharge from Cleansing Services for graffiti cleaning (£32,000) has been deleted as this cost is now borne by them. In addition, the estimate for electricity costs for street lighting has been reduced by £9,000 to reflect current expenditure. These savings in premises costs are partially offset by a £5,000 increase in the estimate for maintenance costs and a £15,000 increase in the estimated AIMS recharge.

The recharge from Cleansing Services for Street Cleaning has also been removed and again will be borne by them, reducing supplies and services costs in this service.

**83A9 BUILDING CONTROL**

The estimate for Land Charges has been included in this management unit to reflect the line management for this service.

The estimates in the management unit are split into a fee earning account and a non-fee earning account. The fee earning account has to break even and the annual estimate is set on this basis.

The fee earning account estimate has been reduced due to the removal of a post from the establishment, the effect of changes in estimates in the fee earning account is that the associated income estimate will reduce. Building Control fees and charges are set at a level to recover all expenditure incurred and can be changed in year if the fee earning account over recovers.

**83B1 LAND DRAINAGE**

The estimate of £2,000 for waste disposal has been deleted as it is no longer required.

Support service recharges to this service have increased.

**83B2 ADMINISTRATION SERVICE**

This service has been merged with other administrative and support services and is now included in the services within the Resources Scrutiny estimates.

**83B3 DIRECTOR**

This management unit and the associated estimates have been transferred to Chief Executive's Unit as part of the senior management restructure.

**83B4 ENGINEERING AND CONSTRUCTION**

Estimated pay costs in this unit have been reduced as a result of the management restructure. However, this is partially offset by the transfer of the Senior Architectural Surveyor to this service from Contracts and Direct Services. Additional costs for supplies and services associated with the post have also been transferred to this unit.

Support service estimated recharges have reduced, particularly for administrative support.

The cost of this unit is fully recharged to other services within the Council.

**83B5 PLANNING SERVICES**

The income estimate for planning applications has been increased partly due to the 15% fee increase implemented by Central Government. In addition to the above an additional amount of £100,000 has been included in the fee income estimate to reflect the level of income currently being received in respect of applications.

Other income sources are expected to exceed the current year estimate meaning an increase in income estimates for pre application planning fees.

The changes to the employee costs in 2013/14 are a reduction in the salary budget due to a reduction in the number of posts funded in this area, this has also resulted in the Superannuation and National Insurance estimates also being less than the current year figure.

In addition to the savings on employee costs there has been a reduction in the estimate in respect of premises, equipment tools and materials and printing.

The Housing & Planning Delivery Grant estimate has been removed. The grant ceased to be awarded and the earmarked reserve set aside to fund this expenditure has also ceased. The reductions are in respect of employee estimates as a number of posts are now funded by ECC, the transfer of the posts has also resulted in the associated on-cost estimates reducing as have the support service recharges.

The estimates held in the M802 Planning Enforcement cost centre have been moved into the M801 Planning cost centre and a new cost centre and estimate has been included in respect of the Community Infrastructure Levy.

The support service recharge to this management unit in respect of Legal services has reduced from the current year estimate.

**83B6 CONSERVATION**

The changes in estimates within this management unit relate to the Asset Improvement and Maintenance (AIM) estimates. An AIM priority in respect of repairs to the City Wall has been funded in 2013/14.

There has also been an increase in the Service and Maintenance and reactive repair elements of AIM. The departmental recharges to this management unit have also increased significantly.

**83B7 ARCHAEOLOGICAL FIELD UNIT**

The estimates included in this management unit relate to the running costs of the Custom House. They include estimates for maintenance of the premises, utility charges, insurance, National Non Domestic Rates and support service recharges.

An amount has also been included in respect of the external decoration of the building which is planned for 2013/14.

Rental income is being received in respect of the element of the property which is externally leased; no estimate for this income was included in 2012/13. Therefore a budget for this income has been included.

**83B8 MAJOR PROJECTS**

There are no material changes in this management unit

**83B9 MARKETS AND HALLS**

Income estimates for the facilities have increased with increases in open air market and the rent received in respect of the Livestock Centre.

The expenditure estimate for event promotion has increased due to the promotion of a greater number of events being held at the Corn Exchange, this increase in estimate has been more than offset by the additional income expected from the events being staged.

The pay costs for this management unit have reduced due to a small reduction in the level of staffing. This has also resulted in the estimate for National Insurance and Superannuation being less than the current year figure. A saving has also been made on the estimate for temporary contracted internal staff.

The Asset Improvement and Maintenance (AIM) estimate is less than the current year with the Service and Maintenance estimate for AIM in respect of the Livestock Centre reducing. The departmental recharge for AIM to this management unit is less than the 2012/13 figure. These reductions have been partially offset by an increase in the National Non Domestic Rates estimate.

The current year estimates included a separate cost centre (C104) for overheads which were recharged via a support service recharge to each facility on an estimated percentage basis; the estimates within the cost centre have been removed and included in the cost centre for the relevant facility. This enables the total cost of each facility to be identified easily. The change has resulted in the support service and income estimates in the management unit reducing.

**83C1 WATERWAYS**

The Topsham ferry operator's post has been reviewed and this has led to increased pay costs, but this will be partially offset by increased income from fares (see below). Also, the management restructure has led to additional pay costs in this unit.

Estimated recharges from AIMS have increased by £13,820. The estimate for electricity charges from boat meters has been increased to reflect current cost experience; this will result in additional income as noted below. These increased costs are partially offset by the deletion of the recharge from Grounds Maintenance, who are now bearing the costs within their own service.

The estimate of £30,000 for the Exe Estuary review has been removed. The balance of the 2012/13 budget will be transferred into an earmarked reserve at the end of the financial year and this will be used to fund any work required in future years.

The recharge from Cleansing Services has been deleted and again the costs will be borne by them, further reducing supplies and services costs in this service.

Estimated support service recharges to this unit have reduced, particularly in relation to administrative and engineering support.

The fees charged by this service have been reviewed, and this is expected to increase income for the unit. In addition, following the review of the Topsham Ferry operation, income from fares is now retained by the Council and this is reflected in the estimates. Finally, income from boat meters for electricity is expected to increase as noted above.

**STRATEGIC DIRECTOR** **ASSISTANT DIRECTOR FINANCE**

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

Appendix 1

# GENERAL FUND - CAPITAL PROGRAMME 2013/14 AND FUTURE YEARS

| | SCHEMES LISTED WITHIN COUNCIL PURPOSES | 2013/14 £ | 2014/15 £ | 2015/16 £ | Future Years £ | Funding |
|---|---|---|---|---|---|---|
| | **IMPROVE THE ENVIRONMENT AND MY NEIGHBOURHOOD** | | | | | |
| 1 | Northbrook flood Alleviation Scheme | 200,000 # | 300,000 # | | | Borrowing |
| 2 | Contribution towards major flood prevention works | | 3,000,000 # | | | Borrowing |
| 3 | Purchase of Drakes Meadow | 280,000 # | | | | New Homes Bonus |
| | **Sub Total - Improve the env. and my neighbourhood** | **480,000** | **3,300,000** | **0** | **0** | |
| | **MAINTAIN THE ASSETS OF OUR CITY** | | | | | |
| 1 | Topsham Lock Leak | 35,000 # | | | | Borrowing |
| 2 | Verney House - Window Replacement | 60,000 # | | | | Borrowing |
| | **Sub Total - Maintain the assets of our city** | **95,000** | **0** | **0** | **0** | |
| 1 | Replacement of car park pay and display machines | 230,000 # | | | | Borrowing but self financing within 2 years |
| | **Sub Total - Other** | **230,000** | **0** | **0** | **0** | |
| | **TOTAL ECONOMY CAPITAL PROGRAMME** | **805,000** | **3,300,000** | **0** | **0** | |

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| | Proposed 2013-14 | | | Agreed 2012-13 | | | |
|---|---|---|---|---|---|---|---|
| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
| **A PLANNING SERVICES** | | | | | | | |
| **1 - SCALE OF CHARGES AND FEES FOR PLANNING AND ADVERTISMENT APPLICATIONS** | | | | | | | |
| The fees collectable are statutory and determined by Central Government. | | | | | | | |
| **2 - PUBLICATIONS** | | | | | | | |
| Conservation Area Character Appraisals* | | | | | | | |
| - Central (only available as a paper copy) | 11.50 | - | 11.50 | 11.20 | - | 11.20 | 7 |
| - Southernhay (only available as a paper copy) | 11.50 | - | 11.50 | 11.20 | - | 11.20 | 7 |
| - Heavitree (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Cowick Street (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Alphington (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Exwick (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Longbrook (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Midway Terrace and Ide Lane (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Riverside (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - St Davids (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Princes Square (FREE to download from the website) | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| *Available on CD for £2 each | | | | | | | |
| Development Plan Documets | | | | | | | |
| - Core Strategy (adopted February 2012) | 20.00 | - | 20.00 | No Corresponding Charge | | | 7 |
| - Exeter Local Plan First Review (with Proposals Map and City Centre Insert) | Free of Charge | | | No Corresponding Charge | | | 7 |
| Supplementary Planning Documents | | | | | | | |
| - Public Open Space | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| - Audit of Outdoor Recreational Facilities | 7.00 | - | 7.00 | 11.20 | - | 11.20 | 7 |
| - Neighbourhood Maps | See below | | | 16.80 | - | 16.80 | 7 |
| - Neighbourhood Maps (Colour) | 12.50 | - | 12.50 | | | | 7 |
| - Neighbourhood Maps (Black & White) | 3.50 | - | 3.50 | | | | 7 |
| - Implementing Open Space Standards | 5.70 | - | 5.70 | | | | 7 |
| - Houses in Multiple Occupation | 5.70 | - | 5.70 | | | | 7 |
| - Student Accommodation Supplementary Planning Guidance | 5.70 | - | 5.70 | | | | 7 |
| - Residential Extensions (Black & White) | 5.70 | - | 5.70 | | | | 7 |
| - Residential Extensions (Colour) | 15.00 | - | 15.00 | | | | 7 |
| - Trees in Relation to Development | 5.70 | - | 5.70 | | | | 7 |
| - Planning Obligations | 5.70 | - | 5.70 | | | | 7 |
| - Affordable Housing | 5.70 | - | 5.70 | | | | 7 |
| - Draft Affordable Housing (2012) | 5.70 | - | 5.70 | | | | 7 |
| - Residential Design Guide | 5.70 | - | 5.70 | | | | 7 |
| - Streatham Campus Masterplan (Black & White) | 5.70 | - | 5.70 | | | | 7 |
| - Streatham Campus Masterplan (Colour) | 20.00 | | 20.00 | | | | |
| Supplementary Planning Guidance | | | | | | | |
| - Archaeology and Development | 5.70 | - | 5.70 | 5.60 | - | 5.60 | 7 |
| Exeter Local Plan First Review | 33.20 | - | 33.20 | 32.40 | - | 32.40 | 7 |
| * half price for residents and students | | | | | | | |
| Local Plan Maps | | | | | | | |
| - Proposals | See Development documents above | | | 2.83 | 0.57 | 3.40 | 3 |
| - City Centre Inset | | | | 1.92 | 0.38 | 2.30 | 3 |
| Newcourt Area Feasibility Study | | | | 20.70 | - | 20.70 | 7 |
| Environmental Study (Cobham Resource Consultant 1996) | | | | | | | |
| Newcourt Area Feasibility Study | | | | 20.70 | - | 20.70 | 7 |
| Transport Study (Rust Consulting Ltd 1996) | | | | | | | |
| Exeter Employment Study (2007) | | | | 28.10 | - | 28.10 | 7 |
| - Black & White | 6.00 | - | 6.00 | | | | |
| - Colour | 20.00 | - | 20.00 | | | | |
| Exeter Fringe Landscape Sensitivity & Capacity Study (2007) | | | | 28.10 | - | 28.10 | 7 |
| - Black & White | 6.50 | - | 6.50 | | | | |
| - Colour (A3) | 22.00 | - | 22.00 | | | | |
| Monkerton & Hill Barton Masterplan (2010) | | | | 25.00 | - | 25.00 | 7 |
| - Black & White | 5.70 | - | 5.70 | | | | |

| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| - Colour (A3) | 15.00 | - | 15.00 | | | | |
| Newcourt Masterplan (2010) | | | | 25.00 | - | 25.00 | 7 |
| - Black & White | 5.70 | - | 5.70 | | | | |
| - Colour (A3) | 12.00 | - | 12.00 | | | | |
| South West Masterplan (2012) | | | | | | | |
| - Black & White | 7.00 | - | 7.00 | | | | |
| - Colour (A3) | 25.00 | - | 25.00 | | | | |
| **3 - OTHER CHARGES** | | | | | | | |
| Copy of Planning Decision Notice<br>- Decisions dated from 1 January 2000 20p per page | 2.33 | 0.47 | 2.80 | 2.25 | 0.45 | 2.70 | 3 |
| Copy Appeal Decision<br>- Decisions dated from 1 January 2000 up to 10 pages 20p per page, over 10 pages £2.80 flat rate | 2.33 | 0.47 | 2.80 | 2.25 | 0.45 | 2.70 | 3 |
| Copy Tree Preservation Order | 2.33 | 0.47 | 2.80 | 2.25 | 0.45 | 2.70 | 3 |
| Copy S.106 (Legal Agreement)<br>- Decisions dated from 1 January 2000 up to 10 pages 20p per page, over 10 pages £2.80 flat rate | 2.33 | 0.47 | 2.80 | 2.25 | 0.45 | 2.70 | 3 |
| Compliance with terms of S106 or similar agreements | 15.92 | 3.18 | 19.10 | No Corresponding Charge | | | 3 |
| Compliance with terms of S106 or similar agreements | 65.42 | 13.08 | 78.50 | No Corresponding Charge | | | 3 |
| Compliance with Conditions: | | | | | | | |
| for Householder planning consents | 28.00 | - | 28.00 | 15.50 | 3.10 | 18.60 | 3 |
| for all other consent types | 97.00 | - | 97.00 | 63.83 | 12.77 | 76.60 | 3 |
| Search type inquiry question answered by letter seeking information about property/land uses, Listed Buildings and Conservation Areas, Planning Decisions, etc - per question | 13.92 | 2.78 | 16.70 | 13.58 | 2.72 | 16.30 | 3 |
| Plan Photocopies (where permitted by Copyright) | | | | | | | |
| - A4 each copy | 0.17 | 0.03 | 0.20 | 0.17 | 0.03 | 0.20 | 3 |
| - A3 each copy | 0.17 | 0.03 | 0.20 | 0.17 | 0.03 | 0.20 | 3 |
| - A2, A1, A0 each copy** | 1.33 | 0.27 | 1.60 | 1.33 | 0.27 | 1.60 | 3 |
| ** if printing outsourced cost to ECC will be charged | | | | | | | |
| Ordnance Survey (OS) A4 Extract | | | | | | | |
| - Exeter City Council Fee per sheet<br>(The charge for an Ordnance Survey (OS) extract map has been set by the OS and agreed with the Council in a Service Level Agreement e.g. £14.05 for 4 copies plus 10p per sheet = £14.45) | 0.17 | 0.03 | 0.20 | 0.17 | 0.03 | 0.20 | 3 |
| Other Photocopying: | | | | | | | |
| - A4 size | 0.17 | 0.03 | 0.20 | 0.17 | 0.03 | 0.20 | 3 |
| - A3 size | 0.17 | 0.03 | 0.20 | 0.17 | 0.03 | 0.20 | 3 |
| NOTE Reasonable requests from school pupils and students of further education will be exempt from charge | | | | | | | |
| **B BUILDING CONTROL** | | | | | | | |
| Research Building Records (add £5 if invoiced) | 14.00 | 2.80 | 16.80 | 13.67 | 2.73 | 16.40 | 3 |
| Copy of Building Regulation Notices | No charge as information available under EIR | | | No charge as information available under EIR | | | 3 |
| **1 - Schedule 1 - Standard charges for one or more Dwellings [Houses up to 300m$^2$ and flats up to three storeys]** | | | | | | | |
| (a) Full Plans | | | | | | | |
| 1 Dwelling | 650.00 | 130.00 | 780.00 | 595.75 | 119.15 | 714.90 | 3 |
| 2 Dwellings | 850.00 | 170.00 | 1,020.00 | 765.96 | 153.19 | 919.15 | 3 |
| 3 Dwellings | 1,050.00 | 210.00 | 1,260.00 | 936.17 | 187.23 | 423.40 | 3 |
| 4 Dwellings | 1,250.00 | 250.00 | 1,500.00 | 1,106.38 | 221.28 | 1,327.66 | 3 |
| 5 Dwellings | 1,425.00 | 285.00 | 1,710.00 | 1,276.60 | 255.32 | 1,531.92 | 3 |
| 6 Dwellings | 1,600.00 | 320.00 | 1,920.00 | 1,446.81 | 289.36 | 1,736.17 | 3 |
| 7 Dwellings | 1,775.00 | 355.00 | 2,130.00 | 1,617.02 | 323.40 | 1,940.42 | 3 |
| 8 Dwellings | 1,950.00 | 390.00 | 2,340.00 | 1,787.23 | 357.45 | 2,144.68 | 3 |
| 9 Dwellings | 2,125.00 | 425.00 | 2,550.00 | 1,957.45 | 391.49 | 2,348.94 | 3 |
| 10 Dwellings | 2,300.00 | 460.00 | 2,760.00 | 2,127.66 | 425.53 | 2,553.19 | 3 |
| (b) Building Notice | | | | | | | |
| 1 Dwelling | 780.00 | 156.00 | 936.00 | 714.89 | 142.96 | 857.87 | 3 |

| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| 2 Dwellings | 1,020.00 | 204.00 | 1,224.00 | 919.15 | 183.83 | 1,102.98 | 3 |
| 3 Dwellings | 1,260.00 | 252.00 | 1,512.00 | 1,123.40 | 224.68 | 1,348.08 | 3 |
| 4 Dwellings | 1,500.00 | 300.00 | 1,800.00 | 1,327.66 | 265.53 | 1,593.19 | 3 |
| 5 Dwellings | 1,710.00 | 342.00 | 2,052.00 | 1,531.91 | 306.18 | 1,838.29 | 3 |
| 6 Dwellings | 1,920.00 | 384.00 | 2,304.00 | 1,736.17 | 347.23 | 2,083.40 | 3 |
| 7 Dwellings | 2,130.00 | 426.00 | 2,556.00 | 1,940.43 | 388.09 | 2,328.52 | 3 |
| 8 Dwellings | 2,340.00 | 468.00 | 2,808.00 | 2,144.68 | 428.94 | 2,573.62 | 3 |
| 9 Dwellings | 2,550.00 | 510.00 | 3,060.00 | 2,348.94 | 469.79 | 2,818.73 | 3 |
| 10 Dwellings | 2,760.00 | 552.00 | 3,312.00 | 2,553.19 | 510.64 | 3,063.83 | 3 |
| (c) RG Charge | | | | | | | |
| 1 Dwelling | 936.00 | - | 936.00 | 860.00 | - | 860.00 | 9 |
| 2 Dwellings | 1,224.00 | - | 1,224.00 | 1,110.00 | - | 1,110.00 | 9 |
| 3 Dwellings | 1,512.00 | - | 1,512.00 | 1,350.00 | - | 1,350.00 | 9 |
| 4 Dwellings | 1,800.00 | - | 1,800.00 | 1,600.00 | - | 1,600.00 | 9 |
| 5 Dwellings | 2,052.00 | - | 2,052.00 | 1,850.00 | - | 1,850.00 | 9 |
| 6 Dwellings | 2,304.00 | - | 2,304.00 | 2,100.00 | - | 2,100.00 | 9 |
| 7 Dwellings | 2,556.00 | - | 2,556.00 | 2,350.00 | - | 2,350.00 | 9 |
| 8 Dwellings | 2,808.00 | - | 2,808.00 | 2,600.00 | - | 2,600.00 | 9 |
| 9 Dwellings | 3,060.00 | - | 3,060.00 | 2,850.00 | - | 2,850.00 | 9 |
| 10 Dwellings | 3,312.00 | - | 3,312.00 | 3,100.00 | - | 3,100.00 | 9 |

**2 - Schedule 3 - Standard charges for work to which Schedules 1 and 2 do not apply.**

(a) Full Plans

| **Estimate of cost** | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| Under £2,000 | 106.38 | 21.28 | 127.66 | 106.38 | 21.28 | 127.66 | 3 |
| £2,000 - £5,000 | 170.21 | 34.04 | 204.25 | 170.21 | 34.04 | 204.25 | 3 |
| £5,001- £10,000 | 212.77 | 42.55 | 255.32 | 212.77 | 42.55 | 255.32 | 3 |
| £10,001 - £25,000 | 340.43 | 68.09 | 408.52 | 340.43 | 68.09 | 408.52 | 3 |
| £25,001 - £50,000 | 553.19 | 110.64 | 663.83 | 553.19 | 110.64 | 663.83 | 3 |
| £50,001- £75,000 | 765.96 | 153.19 | 919.15 | 765.96 | 153.19 | 919.15 | 3 |
| £75,000 - £100,000 | 978.72 | 195.74 | 1,174.46 | 978.72 | 195.74 | 1,174.46 | 3 |

For dwellings above 10, or work in excess of £100,000 please contact Building Control on 01392 265218

**Note** - The BUILDING NOTICE option is not available for buildings subject to The Regulatory Reform [Fire Safety] Order 2005

(b) Building Notice

| **Estimate of cost** | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| Under £2,000 | 127.66 | 25.53 | 153.19 | 127.66 | 25.53 | 153.19 | 3 |
| £2,000 - £5,000 | 204.25 | 40.85 | 245.10 | 204.25 | 40.85 | 245.10 | 3 |
| £5,001- £10,000 | 255.32 | 51.06 | 306.38 | 255.32 | 51.06 | 306.38 | 3 |
| £10,001 - £25,000 | 408.51 | 81.70 | 490.21 | 408.51 | 81.70 | 490.21 | 3 |
| £25,001 - £50,000 | 663.83 | 132.77 | 796.60 | 663.83 | 132.77 | 796.60 | 3 |
| £50,001- £75,000 | 919.15 | 183.83 | 1,102.98 | 919.15 | 183.83 | 1,102.98 | 3 |
| £75,000 - £100,000 | 1,174.47 | 234.89 | 1,409.36 | 1,174.47 | 234.89 | 1,409.36 | 3 |

For dwellings above 10, or work in excess of £100,000 please contact Building Control on 01392 265218

**Note** - The BUILDING NOTICE option is not available for buildings subject to The Regulatory Reform [Fire Safety] Order 2005

(c) RG Charge

| **Estimate of cost** | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| Under £2,000 | 153.19 | - | 153.19 | 155.00 | - | 155.00 | 9 |
| £2,000 - £5,000 | 245.10 | - | 245.10 | 250.00 | - | 250.00 | 9 |
| £5,001- £10,000 | 306.38 | - | 306.38 | 310.00 | - | 310.00 | 9 |
| £10,001 - £25,000 | 490.21 | - | 490.21 | 500.00 | - | 500.00 | 9 |
| £25,001 - £50,000 | 796.60 | - | 796.60 | 800.00 | - | 800.00 | 9 |
| £50,001- £75,000 | 1,102.98 | - | 1,102.98 | 1,100.00 | - | 1,100.00 | 9 |
| £75,000 - £100,000 | 1,409.36 | - | 1,409.36 | 1,420.00 | - | 1,420.00 | 9 |

For dwellings above 10, or work in excess of £100,000 please contact Building Control on 01392 265218

**Note** - The BUILDING NOTICE option is not available for buildings subject to The Regulatory Reform [Fire Safety] Order 2005

**3 - Schedule 2 - Standard charges for work in connection with dwellings**

(a) Full Plans

| **Type of Work** | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| Replacement Glazing in dwellings - Single Unit | 42.55 | 8.51 | 51.06 | 42.55 | 8.51 | 51.06 | 3 |
| Replacement Glazing in dwellings - Multiple Units | 72.34 | 14.47 | 86.81 | 72.34 | 14.47 | 86.81 | 3 |
| Domestic Electrical Installations [CP serves BS 7671 | 42.55 | 8.51 | 51.06 | 42.55 | 8.51 | 51.06 | 3 |
| Domestic Electrical Installations [ECC to carry out | 212.77 | 42.55 | 255.32 | 212.77 | 42.55 | 255.32 | 3 |
| Extensions or Loft Conversions - Not exceeding $10m^2$ | 297.87 | 59.57 | 357.44 | 297.87 | 59.57 | 357.44 | 3 |
| Extensions or Loft Conversions - $10m^2$ to $40m^2$ | 425.53 | 85.11 | 510.64 | 425.53 | 85.11 | 510.64 | 3 |
| Extensions or Loft Conversions - $40m^2$ to $60m^2$ | 574.47 | 114.89 | 689.36 | 574.47 | 114.89 | 689.36 | 3 |
| Conversion of attached garage to domestic habitable room | 297.87 | 59.57 | 357.44 | 299.87 | 59.57 | 357.44 | 3 |
| Garages, carports or similar - [not exempt] less than $40m^2$ | 127.66 | 25.53 | 153.19 | 127.66 | 25.53 | 153.19 | 3 |
| Re-roofing of existing dwellings | 127.66 | 25.53 | 153.19 | 127.66 | 25.53 | 153.19 | 3 |

| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|

**Note** - For extensions or loft conversions exc 60m$^2$, the minimum standard charge in Schedule 3 is £675.00 inc VAT for a Full Plans application and £810.00 inc Vat for a Building Notice application

**Note** - The 'Regularisation charge' does not attract a VAT

(b) Building Notice

| **Type of Work** | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| Replacement Glazing in dwellings - Single Unit | 42.55 | 8.51 | 51.06 | 42.55 | 8.51 | 51.06 | 3 |
| Replacement Glazing in dwellings - Multiple Units | 72.34 | 14.47 | 86.81 | 72.34 | 14.47 | 86.81 | 3 |
| Domestic Electrical Installations [CP serves BS 7671 | 42.55 | 8.51 | 51.06 | 42.55 | 8.51 | 51.06 | 3 |
| Domestic Electrical Installations [ECC to carry out | 212.77 | 42.55 | 255.32 | 212.77 | 42.55 | 255.32 | 3 |
| Extensions or Loft Conversions - Not exceeding 10m$^2$ | 357.45 | 71.49 | 428.94 | 357.45 | 71.49 | 428.94 | 3 |
| Extensions or Loft Conversions - 10m$^2$ to 40m$^2$ | 510.64 | 102.13 | 612.77 | 511.64 | 102.13 | 613.77 | 3 |
| Extensions or Loft Conversions - 40m$^2$ to 60m$^2$ | 689.37 | 137.87 | 827.24 | 689.37 | 137.87 | 827.24 | 3 |
| Conversion of attached garage to domestic habitable room | 357.45 | 71.49 | 428.94 | 357.45 | 71.49 | 428.94 | 3 |
| Garages, carports or similar - [not exempt] less than 40m$^2$ | 153.19 | 30.64 | 183.83 | 153.19 | 30.64 | 183.83 | 3 |
| Re-roofing of existing dwellings | 127.66 | 25.53 | 153.19 | 127.66 | 25.53 | 153.19 | 3 |

**Note** - For extensions or loft conversions exc 60m$^2$, the minimum standard charge in Schedule 3 is £675.00 inc VAT for a Full Plans application and £810.00 inc Vat for a Building Notice application

**Note** - The 'Regularisation charge' does not attract a VAT

(c) RG Charge

| **Type of Work** | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| Replacement Glazing in dwellings - Single Unit | 51.06 | - | 51.06 | 55.00 | - | 55.00 | 9 |
| Replacement Glazing in dwellings - Multiple Units | 86.81 | - | 86.81 | 95.00 | - | 95.00 | 9 |
| Domestic Electrical Installations [CP serves BS 7671 | 51.06 | - | 51.06 | 55.00 | - | 55.00 | 9 |
| Domestic Electrical Installations [ECC to carry out | 255.32 | - | 255.32 | 260.00 | - | 260.00 | 9 |
| Extensions or Loft Conversions - Not exceeding 10m$^2$ | 428.94 | - | 428.94 | 430.00 | - | 430.00 | 9 |
| Extensions or Loft Conversions - 10m$^2$ to 40m$^2$ | 612.77 | - | 612.77 | 615.00 | - | 615.00 | 9 |
| Extensions or Loft Conversions - 40m$^2$ to 60m$^2$ | 827.24 | - | 827.24 | 830.00 | - | 830.00 | 9 |
| Conversion of attached garage to domestic habitable room | 428.94 | - | 428.94 | 430.00 | - | 430.00 | 9 |
| Garages, carports or similar - [not exempt] less than 40m$^2$ | 183.83 | - | 183.83 | 185.00 | - | 185.00 | 9 |
| Re-roofing of existing dwellings | 153.19 | - | 153.19 | 185.00 | - | 185.00 | 9 |

**Note** - For extensions or loft conversions exc 60m$^2$, the minimum standard charge in Schedule 3 is £675.00 inc VAT for a Full Plans application and £810.00 inc Vat for a Building Notice application

**Note** - The 'Regularisation charge' does not attract a VAT

**C LOCAL LAND CHARGES**

| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| - Basic Standard Fee | 77.00 | - | 77.00 | 77.00 | - | 77.00 | 9 |
| - Basic Standard Fee *(submitted electronically)* | 67.00 | - | 67.00 | 67.00 | - | 67.00 | 9 |
| - LLC1 Enquires | 18.00 | - | 18.00 | 18.00 | - | 18.00 | 9 |
| - LLC1 Enquires *(submitted electronically)* | 16.00 | - | 16.00 | 16.00 | - | 16.00 | 9 |
| - Extra Question (Optional Enquiries Part Two) | 2.00 | - | 2.00 | 2.00 | - | 2.00 | 9 |
| - Extra Question (Optional Enquiries Q5/Q22) (set by Devon CC) | 4.50 | - | 4.50 | 4.50 | - | 4.50 | 9 |
| - Each Additional Enquiry | 2.00 | - | 2.00 | 2.00 | - | 2.00 | 9 |
| - Extra Parcel | 2.00 | - | 2.00 | 2.00 | - | 2.00 | 9 |
| - Con 29R Enquires | 59.00 | - | 59.00 | 59.00 | - | 59.00 | 9 |
| - Con 29R Enquires *(submitted electronically)* | 51.00 | - | 51.00 | 51.00 | - | 51.00 | 9 |
| - Personal Searches | 0.00 | - | 0.00 | 0.00 | - | 0.00 | 9 |

| | | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|---|
| D | **UNDERGROUND PASSAGES** | | | | | | | |
| | Adult | 4.67 | 0.93 | 5.60 | 4.58 | 0.92 | 5.50 | 3 |
| | Child (5-16) | 3.42 | 0.68 | 4.10 | 3.33 | 0.67 | 4.00 | 3 |
| | Senior/Student | 3.83 | 0.77 | 4.60 | 3.75 | 0.75 | 4.50 | 3 |
| | Family (2 adults and up to 3 children) | 14.50 | 2.90 | 17.40 | 14.17 | 2.83 | 17.00 | 3 |
| | Adult group | 3.83 | 0.77 | 4.60 | 3.75 | 0.75 | 4.50 | 3 |
| | Child group | 2.67 | 0.53 | 3.20 | 2.58 | 0.52 | 3.10 | 3 |
| | Conc group | 3.42 | 0.68 | 4.10 | 3.33 | 0.67 | 4.00 | 3 |
| | * Admission fees are subject to discounting during quiet periods to encourage visitors to, and residents, of Exeter. | | | | | | | |
| E | **RED COAT GUIDED GROUP TOURS** | | | | | | | |
| | Adult | 2.42 | 0.48 | 2.90 | 2.42 | 0.48 | 2.90 | 3 |
| | Child (5-16) | 1.67 | 0.33 | 2.00 | 1.58 | 0.32 | 1.90 | 3 |
| G | **CANAL AND RIVER EXE** | | | | | | | |
| | *** With effect from 1st April 2013** | | | | | | | |
| | **1 - Canal and Town Commodity Dues** | | | | | | | |
| | Town Commodity Dues | | | | | | | |
| | Imports and Exports - all commodities | By Negotiation | | | By Negotiation | | | |
| | **2 - Dues on Importing/Exporting/Passenger Vessels (zero rated)** | | | | | | | |
| | (a) Canal Dues | | | | | | | |
| | - Importing and/or exporting per gross registered tonne. | 0.80 | - | 0.80 | 0.80 | - | 0.80 | 7 |
| | (b) Topsham Quay Dues | | | | | | | |
| | - Importing and/or exporting per gross registered tonne. | 0.60 | - | 0.60 | 0.60 | - | 0.60 | 7 |
| | (c) Local Light Dues<br>All Commercial Vessels Entering Port<br>(scale based on gross registered tonne) | | | | | | | |
| | - Vessels of up to 100 GRT | 10.40 | - | 10.40 | 10.10 | - | 10.10 | 7 |
| | - Vessels of 101 - 200 GRT | 13.80 | - | 13.80 | 13.50 | - | 13.50 | 7 |
| | - Vessels of 201 - 300 GRT | 19.30 | - | 19.30 | 18.80 | - | 18.80 | 7 |
| | - Vessels of 301 - 1,000 GRT | 27.70 | - | 27.70 | 27.00 | - | 27.00 | 7 |
| | - Vessels over 1,001 GRT | 32.10 | - | 32.10 | 31.30 | - | 31.30 | 7 |
| | (d) Additional Charge for Vessels per one-way passage through Canal outside normal working hours | | | | | | | |
| | - All EXCEPT Bank Holidays/Sundays | 157.40 | - | 157.40 | 153.60 | - | 153.60 | 7 |
| | - Bank Holidays/Sundays | 209.90 | - | 209.90 | 204.80 | - | 204.80 | 7 |
| | (e) Mooring on Bight Buoy | | | | | | | |
| | - Charge per Day | 41.30 | - | 41.30 | 40.30 | - | 40.30 | 7 |

| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| (f) Services | | | | | | | |
| - Standing Charge, per visit | 16.75 | 3.35 | 20.10 | 16.33 | 3.27 | 19.60 | 3 |
| - Water, Electricity, Waste Disposal | At cost plus contribution to maintenance etc | | | At cost plus contribution to maintenance etc | | | |
| (g) Repairs and Layups (per metre per day or part thereof) | | | | | | | |
| (i) Laying alongside, not loading or unloading, | | | | | | | |
| Canal | 2.10 | - | 2.10 | 2.00 | - | 2.00 | 7 |
| Topsham Quay | 2.30 | - | 2.30 | 2.20 | - | 2.20 | 7 |
| (ii) On the Quay | | | | | | | |
| Canal | 2.10 | - | 2.10 | 2.00 | - | 2.00 | 7 |
| Topsham Quay | 2.80 | - | 2.80 | 2.70 | - | 2.70 | 7 |
| (h) Passenger Vessels | | | | | | | |
| (i) Use of landing facilities (per passenger per one way passage) | 0.30 | - | 0.30 | 0.30 | - | 0.30 | 7 |
| (ii) Canal passage (one way) | 107.60 | - | 17.60 | 105.00 | - | 105.00 | 7 |
| (iii) Additional charge per one-way canal passage outside normal working hours: | | | | | | | |
| - Non Bank Holidays / Sundays | 53.70 | - | 53.70 | 52.40 | - | 52.40 | 7 |
| - Bank Holidays, Sundays | 107.60 | - | 107.60 | 105.00 | - | 105.00 | 7 |
| **3 - Dues on other Vessels** | | | | | | | |
| (a) Berthing Licence (per metre per month - part months pro rata (min 4 weeks)) | | | | | | | |
| - Canal in the water at Turf | 8.50 | 1.70 | 10.20 | 6.83 | 1.37 | 8.20 | 3 |
| - Canal in the water at Basin | 8.50 | 1.70 | 10.20 | 7.50 | 1.50 | 9.00 | 3 |
| - Canal Basin on the Quay / in a compound | 8.50 | 1.70 | 10.20 | 8.50 | 1.70 | 10.20 | 3 |
| - Turf Depot in the shed | n/a | | | 10.00 | 2.00 | 12.00 | 3 |
| - Topsham Quay in the water | 10.50 | 2.10 | 12.60 | 8.50 | 1.70 | 10.20 | 3 |
| (Monthly rate doesn't apply May-Aug when a minimum 5 months summer permit is required, or visitor rate (3)(e)(ii) applies) | | | | | | | |
| - Topsham Quay on the Quay* | 10.50 | 2.10 | 12.60 | 9.83 | 1.97 | 11.80 | 3 |
| (Minimum 5 month period to include Nov-Feb) * booking deposit required | | | | | | | |
| (i) Charges inclusive of locking and passage through canal during normal working hours, but delays in arrival and departure can incur a charge under 3(f). | | | | | | | |
| (ii) Locking/passage outside of normal working hours | 60.00 | 12.00 | 72.00 | At Cost | | | |
| (iii) Multihulls incur a 25% supplementary charge | | | | | | | |
| (iv) Length, calculation includes bowsprits, bumkins and any other permanent or temporary extensions to a vessel's overall length, excluding masts stored on deck not interfering with other vessels. | | | | | | | |
| (v) Trailers, empty cradles and other similarly stored items at half rate (containers charged at full rate). | | | | | | | |

| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| (vi) 10% surcharge for late payments over 28 days from date of pro-forma invoice subject to any recovery costs incurred (also applicable to 3(b)(iii) and 3(c)) | | | | | | | |
| (b) Cranage<br>Subject to condition of use 4 & 6 | | | | | | | |
| (i) Lift in or out | Actual cost | | | Actual cost | | | |
| (ii) Cranage over quays per metre each way (free for vessels charged under 3(a) stored for more than 2 months) | Inclusive | | | 2.25 | 0.45 | 2.70 | 3 |
| (iii) Hire of cradles per (boat) metre per month (or part month) - cradle or legs on keel boats compulsory | 2.50 | 0.50 | 3.00 | 2.17 | 0.43 | 2.60 | 3 |
| (c) Masts | | | | | | | |
| - Stepping or striking per hour or part | 40.00 | 8.00 | 48.00 | 38.00 | 7.60 | 45.60 | 3 |
| - Storage of masts ashore (per period up to 12 months) | 55.00 | 11.00 | 66.00 | 50.17 | 10.03 | 60.20 | 3 |
| (d) Services | | | | | | | |
| - Water and Waste Disposal | Inclusive | | | Inclusive | | | 3 |
| - Electricity | At cost plus contribution to maintenance etc | | | At cost plus contribution to maintenance etc | | | 3 |
| (e) Visitors' Mooring and Berths | | | | | | | |
| (i) Exmouth Bight and Turf Mooring Buoys | | | | | | | |
| - per half day or less | 6.00 | 1.20 | 7.20 | 5.00 | 1.00 | 6.00 | 3 |
| - per day | 10.00 | 2.00 | 12.00 | 9.00 | 1.80 | 10.80 | 3 |
| - > 13m on ship's buoy (per day or part) | n/a | | | 14.00 | 2.80 | 16.80 | 3 |
| (ii) Berths alongside per day (max. period 4 weeks) | | | | | | | |
| - Turf Basin (min period 2 days) | 12.00 | 2.40 | 14.40 | 10.17 | 2.03 | 12.20 | 3 |
| - Topsham Quay (on/or alongside) | 8.00 | 1.60 | 9.60 | 7.17 | 1.43 | 8.60 | 3 |
| (f) Assistance | | | | | | | |
| - Labour per hour (minimum charge £40) | 40.00 | 8.00 | 48.00 | 38.00 | 7.60 | 45.60 | 3 |
| - Labour per hour with use of boat (minimum charge £65) | 65.00 | 13.00 | 78.00 | 60.00 | 12.00 | 72.00 | 3 |
| NB: Also applies for :<br>- Delays due to late or non-appearance at booked time<br>- Re-berthing at customer's request<br>- Cleaning up scrapings, boat litter etc | | | | | | | |
| **4 - Licensing of Pleasure Craft and Boat Operators** | | | | | | | |
| Pleasure Craft (per annum) | 10.00 | 2.00 | 12.00 | 8.92 | 1.78 | 10.70 | 3 |
| Operators (per annum) | | | | | | | |
| - Initial (including test) | 50.00 | 10.00 | 60.00 | 45.83 | 9.17 | 55.00 | 3 |
| - Renewal | 10.00 | 2.00 | 12.00 | 8.92 | 1.78 | 10.70 | 3 |

| | Fee £ p | VAT @ 20% £ p | Total £ p | Fee £ p | VAT @ 20% £ p | Total £ p | VAT Code |
|---|---|---|---|---|---|---|---|
| **5 - Topsham Ferry** | | | | | | | |
| - Adult per person | 0.84 | 0.16 | 1.00 | 0.75 | 0.15 | 0.90 | 3 |
| - Under 18's & Senior Citizen | 0.42 | 0.08 | 0.50 | 0.42 | 0.08 | 0.50 | 3 |
| - Dogs | 0.42 | 0.08 | 0.50 | 0.25 | 0.05 | 0.30 | 3 |
| - Bicycles, pushchairs etc | 0.42 | 0.08 | 0.50 | 0.42 | 0.08 | 0.50 | 3 |
| **6 - Salmon Fishing Permits** | | | | | | | |
| - Annual | 70.00 | 14.00 | 84.00 | 68.00 | 13.60 | 81.60 | 3 |
| - Day | 8.00 | 1.60 | 9.60 | 7.17 | 1.43 | 8.60 | 3 |

# SCRUTINY COMMITTEE - ECONOMY

## 5ECONR - ECONOMY REVENUE

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 4,040,050 | 61,930 | (238,270) | - | (141,880) | 3,721,830 |
| PREMISES | 2,401,910 | 48,540 | - | - | (4,810) | 2,445,640 |
| SUPPLIES & SERVICES | 1,637,880 | 4,330 | (91,300) | - | 46,020 | 1,596,930 |
| TRANSPORT | 82,770 | 2,180 | - | - | (7,510) | 77,440 |
| SUPPORT SERVICES | 2,562,690 | 37,640 | - | - | (730,390) | 1,869,940 |
| CAPITAL CHARGES | 366,240 | - | - | - | - | 366,240 |
| **Total Expense** | **11,091,540** | **154,620** | **(329,570)** | **-** | **(838,570)** | **10,078,020** |
| | | | | | | |
| INCOME | (13,628,670) | (149,960) | (610,000) | - | 400,890 | (13,987,740) |
| **Total Income** | **(13,628,670)** | **(149,960)** | **(610,000)** | **-** | **400,890** | **(13,987,740)** |
| | | | | | | |
| **Net Expenditure** | **(2,537,130)** | **4,660** | **(939,570)** | **0** | **(437,680)** | **(3,909,720)** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| 83A1 - PROPERTY & ESTATES SERVICES | (2,648,000) | 10,250 | - | - | (215,470) | (2,853,220) |
| 83A2 - TRANSPORT/CONCESSIONARY FARES | 72,080 | (310) | - | - | (21,770) | 50,000 |
| 83A3 - CAR PARKING | (3,361,350) | 23,310 | (511,850) | - | (26,280) | (3,876,170) |
| 83A4 - ECONOMIC DEVELOPMENT | 648,060 | 6,300 | (71,700) | - | (71,150) | 511,510 |
| 83A5 - ARTS & EVENTS | 288,940 | 2,460 | (85,000) | - | (11,660) | 194,740 |
| 83A6 - TOURIST INFORMATION | 457,290 | 4,570 | - | - | (12,730) | 449,130 |
| 83A8 - DISTRICT HIGHWAYS & FOOTPATHS | 377,690 | 4,390 | - | - | (31,340) | 350,740 |
| 83A9 - BUILDING CONTROL | 140,710 | (2,310) | (3,360) | - | (14,340) | 120,700 |
| 83B1- LAND DRAINAGE | 146,430 | 980 | - | - | 11,780 | 159,190 |
| 83B2 - ADMINISTRATION SERVICE | - | 660 | - | - | (660) | - |
| 83B4 - ENGINEERING/CONSTRUCTION SERVS | - | 1,750 | - | - | (1,750) | - |
| 83B5 - PLANNING SERVICES | 972,510 | (47,190) | (251,360) | - | 39,830 | 713,790 |
| 83B6 - CONSERVATION | 57,300 | 30 | (6,300) | - | 65,550 | 116,580 |
| 83B7 - ARCHAEOLOGICAL FIELD UNIT | 62,640 | 1,900 | - | - | 2,190 | 66,730 |
| 83B8 - MAJOR PROJECTS | 75,000 | - | - | - | - | 75,000 |
| 83B9 - MARKETS & HALLS | (175,030) | (3,260) | - | - | (105,520) | (283,810) |
| 83C1 - WATERWAYS | 348,600 | 1,130 | (10,000) | - | (44,360) | 295,370 |
| Net Cost | **(2,537,130)** | **4,660** | **(939,570)** | **0** | **(437,680)** | **(3,909,720)** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A1 - PROPERTY & ESTATES SERVICES

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 328,970 | 4,950 | - | - | (3,030) | 330,890 |
| PREMISES | 231,670 | 1,590 | - | - | (19,100) | 214,160 |
| SUPPLIES & SERVICES | 77,570 | 360 | - | - | 7,250 | 85,180 |
| TRANSPORT | 1,030 | 20 | - | - | (220) | 830 |
| SUPPORT SERVICES | 615,580 | 9,190 | - | - | (104,930) | 519,840 |
| **Total Expense** | **1,254,820** | **16,110** | **-** | **-** | **(120,030)** | **1,150,900** |
| | | | | | | |
| INCOME | (3,902,820) | (5,860) | - | - | (95,440) | (4,004,120) |
| **Total Income** | **(3,902,820)** | **(5,860)** | **-** | **-** | **(95,440)** | **(4,004,120)** |
| | | | | | | |
| **Net Expenditure** | **(2,648,000)** | **10,250** | **0** | **0** | **(215,470)** | **(2,853,220)** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M001 COMMERCIAL PROPERTIES | (1,856,410) | 3,200 | - | - | (89,000) | (1,942,210) |
| M002 MISCELLANEOUS PROPERTIES | (448,380) | 3,460 | - | - | (110,590) | (555,510) |
| M003 MARSH BARTON/PINHOE ESTATES | (88,560) | 670 | - | - | (28,780) | (116,670) |
| M004 BRADNINCH PLACE | (18,580) | 410 | - | - | (20,860) | (39,030) |
| M005 SOWTON INDUSTRIAL ESTATE | 950 | 20 | - | - | (120) | 850 |
| M006 ST GEORGES RETAIL UNITS | (272,020) | 270 | - | - | 16,100 | (255,650) |
| M008 EXETER BUSINESS CENTRE PROV | 35,000 | - | - | - | 20,000 | 55,000 |
| T104 ESTATE SERVICES | 401,310 | 7,950 | - | - | (20,480) | 388,780 |
| T105 PROPERTY RECORDS | 40,970 | 900 | - | - | (8,900) | 32,970 |
| U104 PROP & ESTS INTERNAL RECHGS | (442,280) | (6,630) | - | - | 27,160 | (421,750) |
| Net Cost | **(2,648,000)** | **10,250** | **0** | **0** | **(215,470)** | **(2,853,220)** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A2 - TRANSPORT/CONCESSIONARY FARES

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | - | - | - | - | 18,990 | 18,990 |
| PREMISES | - | - | - | - | 50 | 50 |
| SUPPLIES & SERVICES | 69,440 | - | - | - | - | 69,440 |
| SUPPORT SERVICES | 50,030 | 740 | - | - | (41,320) | 9,450 |
| **Total Expense** | **119,470** | **740** | **-** | **-** | **(22,280)** | **97,930** |
| | | | | | | |
| INCOME | (47,390) | (1,050) | - | - | 510 | (47,930) |
| **Total Income** | **(47,390)** | **(1,050)** | **-** | **-** | **510** | **(47,930)** |
| | | | | | | |
| **Net Expenditure** | **72,080** | **(310)** | **0** | **0** | **(21,770)** | **50,000** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M102 TRANSPORTATION INITIATIVES | 70,080 | 220 | - | - | (21,800) | 48,500 |
| M104 GREEN TRAVEL PLAN | 2,000 | (530) | - | - | 30 | 1,500 |
| Net Cost | **72,080** | **(310)** | **0** | **0** | **(21,770)** | **50,000** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A3 - CAR PARKING

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 806,040 | 12,230 | (11,850) | - | (30,050) | 776,370 |
| PREMISES | 1,223,960 | 26,770 | - | - | (17,280) | 1,233,450 |
| SUPPLIES & SERVICES | 302,620 | 1,550 | - | - | (4,120) | 300,050 |
| TRANSPORT | 19,370 | 750 | - | - | (190) | 19,930 |
| SUPPORT SERVICES | 206,510 | 3,000 | - | - | (20,300) | 189,210 |
| CAPITAL CHARGES | 129,510 | - | - | - | - | 129,510 |
| **Total Expense** | **2,688,010** | **44,300** | **(11,850)** | **-** | **(71,940)** | **2,648,520** |
| | | | | | | |
| INCOME | (6,049,360) | (20,990) | (500,000) | - | 45,660 | (6,524,690) |
| **Total Income** | **(6,049,360)** | **(20,990)** | **(500,000)** | **-** | **45,660** | **(6,524,690)** |
| | | | | | | |
| **Net Expenditure** | **(3,361,350)** | **23,310** | **(511,850)** | **0** | **(26,280)** | **(3,876,170)** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M201 CAR PARKS | (3,384,600) | 27,120 | (511,850) | - | (30,320) | (3,899,650) |
| M202 CAR PARK INVESTMENT PROPERTIES | (36,610) | - | - | - | - | (36,610) |
| M204 CPE | - | (4,990) | - | - | 4,990 | - |
| T107 CASH COLLECTION | 69,060 | 1,320 | - | - | 1,740 | 72,120 |
| U107 CASH COLLECTION INT RECHARGE | (9,200) | (140) | - | - | (2,690) | (12,030) |
| Net Cost | **(3,361,350)** | **23,310** | **(511,850)** | **0** | **(26,280)** | **(3,876,170)** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A4 - ECONOMIC DEVELOPMENT

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 350,510 | 5,320 | (71,700) | - | (1,440) | 282,690 |
| PREMISES | 1,300 | 40 | - | - | - | 1,340 |
| SUPPLIES & SERVICES | 199,540 | 10 | - | - | (16,800) | 182,750 |
| TRANSPORT | 1,080 | 20 | - | - | 300 | 1,400 |
| SUPPORT SERVICES | 191,800 | 2,760 | - | - | (60,440) | 134,120 |
| CAPITAL CHARGES | - | - | - | - | - | - |
| **Total Expense** | **744,230** | **8,150** | **(71,700)** | **-** | **(78,380)** | **602,300** |
| | | | | | | |
| INCOME | (96,170) | (1,850) | - | - | 7,230 | (90,790) |
| **Total Income** | **(96,170)** | **(1,850)** | **-** | **-** | **7,230** | **(90,790)** |
| | | | | | | |
| **Net Expenditure** | **648,060** | **6,300** | **(71,700)** | **0** | **(71,150)** | **511,510** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M301 ECONOMY & TOURISM ADMIN | 441,910 | 6,320 | (51,350) | - | (64,640) | 332,240 |
| M303 ECONOMIC/PARTNER INITIATIVES | 112,380 | 10 | - | - | (14,670) | 97,720 |
| M304 MARKETING | 40,280 | - | - | - | (130) | 40,150 |
| M305 CITY CENTRE MANAGEMENT | 53,490 | 460 | (20,350) | - | 7,800 | 41,400 |
| M308 CITY CENTRE MANAGER | - | - | - | - | - | - |
| M309 BUSINESS CRIME REDUCTION INIT | - | (490) | - | - | 490 | - |
| Net Cost | **648,060** | **6,300** | **(71,700)** | **0** | **(71,150)** | **511,510** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A5 - ARTS & EVENTS

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 64,300 | 980 | - | - | (1,450) | 63,830 |
| PREMISES | - | - | - | - | - | - |
| SUPPLIES & SERVICES | 182,980 | 840 | (85,000) | - | 22,920 | 121,740 |
| TRANSPORT | 400 | 10 | - | - | (90) | 320 |
| SUPPORT SERVICES | 42,260 | 650 | - | - | (11,960) | 30,950 |
| **Total Expense** | **289,940** | **2,480** | **(85,000)** | **-** | **9,420** | **216,840** |
| INCOME | (1,000) | (20) | - | - | (21,080) | (22,100) |
| **Total Income** | **(1,000)** | **(20)** | **-** | **-** | **(21,080)** | **(22,100)** |
| **Net Expenditure** | **288,940** | **2,460** | **(85,000)** | **0** | **(11,660)** | **194,740** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M401 ARTS & EVENTS ADMINISTRATION | 113,590 | 1,640 | - | - | (13,840) | 101,390 |
| M402 ARTS & EVENTS | 65,000 | 820 | - | - | 3,180 | 69,000 |
| M403 ANIMATION FESTIVAL | 20,000 | - | - | - | - | 20,000 |
| M405 VIBRAPHONIC | 2,000 | - | - | - | (2,000) | - |
| M408 OPEN STUDIOS | 1,350 | - | - | - | - | 1,350 |
| M410 RESPECT FESTIVAL | 2,000 | - | - | - | 1,000 | 3,000 |
| M411 OLYMPIC TORCH EVENT | 85,000 | - | (85,000) | - | - | - |
| Net Cost | **288,940** | **2,460** | **(85,000)** | **0** | **(11,660)** | **194,740** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A6 - TOURIST INFORMATION

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 305,010 | 4,730 | - | - | (1,390) | 308,350 |
| PREMISES | 96,180 | 2,320 | - | - | 290 | 98,790 |
| SUPPLIES & SERVICES | 181,360 | 140 | - | - | (790) | 180,710 |
| TRANSPORT | 4,210 | 90 | - | - | (130) | 4,170 |
| SUPPORT SERVICES | 97,920 | 1,460 | - | - | (18,560) | 80,820 |
| CAPITAL CHARGES | 3,190 | - | - | - | - | 3,190 |
| **Total Expense** | **687,870** | **8,740** | **-** | **-** | **(20,580)** | **676,030** |
| | | | | | | |
| INCOME | (230,580) | (4,170) | - | - | 7,850 | (226,900) |
| **Total Income** | **(230,580)** | **(4,170)** | **-** | **-** | **7,850** | **(226,900)** |
| | | | | | | |
| **Net Expenditure** | **457,290** | **4,570** | **0** | **0** | **(12,730)** | **449,130** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M501 TOURISM ADMINISTRATION | 151,880 | 2,310 | - | - | (4,490) | 149,700 |
| M502 TOURISM | 63,890 | 10 | - | - | (5,540) | 58,360 |
| M503 EXETER VISITOR INFORMATION | 142,230 | 710 | - | - | (8,880) | 134,060 |
| M504 UNDERGROUND PASSAGES | 84,580 | 600 | - | - | 5,690 | 90,870 |
| M505 QUAY HOUSE VISITOR CENTRE | 5,860 | 1,080 | - | - | 670 | 7,610 |
| M506 TOUR GUIDES | 8,850 | (140) | - | - | (180) | 8,530 |
| Net Cost | **457,290** | **4,570** | **0** | **0** | **(12,730)** | **449,130** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A8 - DISTRICT HIGHWAYS & FOOTPATHS

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PREMISES | 162,690 | 3,710 | - | - | (15,630) | 150,770 |
| SUPPLIES & SERVICES | 12,560 | - | - | - | (12,560) | - |
| TRANSPORT | - | - | - | - | - | - |
| SUPPORT SERVICES | 45,820 | 680 | - | - | (3,150) | 43,350 |
| CAPITAL CHARGES | 156,620 | - | - | - | - | 156,620 |
| **Total Expense** | **377,690** | **4,390** | **-** | **-** | **(31,340)** | **350,740** |
| | | | | | | |
| **Net Expenditure** | **377,690** | **4,390** | **0** | **0** | **(31,340)** | **350,740** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M601 FOOTPATHS MAINTENANCE | 145,260 | 630 | - | - | 16,270 | 162,160 |
| M602 SIGNS & SUNDRIES | 184,950 | 990 | - | - | (42,230) | 143,710 |
| M603 STREET NAMING | 6,000 | - | - | - | - | 6,000 |
| M604 STREET LIGHTING | 41,480 | 2,770 | - | - | (5,380) | 38,870 |
| Net Cost | **377,690** | **4,390** | **0** | **0** | **(31,340)** | **350,740** |

# SCRUTINY COMMITTEE - ECONOMY

## 83A9 - BUILDING CONTROL

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 401,250 | 6,120 | (3,360) | - | (53,710) | 350,300 |
| SUPPLIES & SERVICES | 71,200 | 580 | - | - | (8,340) | 63,440 |
| TRANSPORT | 12,800 | 270 | - | - | (4,490) | 8,580 |
| SUPPORT SERVICES | 158,700 | 2,150 | - | - | (43,690) | 117,160 |
| **Total Expense** | **643,950** | **9,120** | **(3,360)** | **-** | **(110,230)** | **539,480** |
| | | | | | | |
| INCOME | (503,240) | (11,430) | - | - | 95,890 | (418,780) |
| **Total Income** | **(503,240)** | **(11,430)** | **-** | **-** | **95,890** | **(418,780)** |
| | | | | | | |
| **Net Expenditure** | **140,710** | **(2,310)** | **(3,360)** | **0** | **(14,340)** | **120,700** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M011 LAND CHARGES | 200 | (1,240) | - | - | (3,280) | (4,320) |
| M701 BUILDING CONTROL FEE EARNING | - | (3,150) | - | - | 3,150 | - |
| M702 BUILDING CONTROL ADVICE | 140,510 | 2,080 | (3,360) | - | (14,210) | 125,020 |
| Net Cost | **140,710** | **(2,310)** | **(3,360)** | **0** | **(14,340)** | **120,700** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B1- LAND DRAINAGE

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PREMISES | 72,500 | - | - | - | - | 72,500 |
| SUPPLIES & SERVICES | 2,000 | - | - | - | (2,000) | - |
| SUPPORT SERVICES | 65,860 | 980 | - | - | 13,780 | 80,620 |
| CAPITAL CHARGES | 6,070 | - | - | - | - | 6,070 |
| **Total Expense** | **146,430** | **980** | **-** | **-** | **11,780** | **159,190** |

| | | | | | | |
|---|---|---|---|---|---|---|
| **Net Expenditure** | **146,430** | **980** | **0** | **0** | **11,780** | **159,190** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M611 LAND DRAINAGE - WATER COURSES | 138,060 | 850 | - | - | 6,280 | 145,190 |
| M612 SEWER MAPS | 4,030 | 60 | - | - | (1,090) | 3,000 |
| M613 DEVELOPMENT SITES | 4,340 | 70 | - | - | 6,590 | 11,000 |
| Net Cost | **146,430** | **980** | **0** | **0** | **11,780** | **159,190** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B2 - ADMINISTRATION SERVICE

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 96,950 | 1,480 | - | - | (98,430) | - |
| SUPPLIES & SERVICES | 3,210 | - | - | - | (3,210) | - |
| SUPPORT SERVICES | 39,870 | 580 | - | - | (40,450) | - |
| **Total Expense** | **140,030** | **2,060** | **-** | **-** | **(142,090)** | **-** |
| | | | | | | |
| INCOME | (140,030) | (1,400) | - | - | 141,430 | - |
| **Total Income** | **(140,030)** | **(1,400)** | **-** | **-** | **141,430** | **-** |
| | | | | | | |
| **Net Expenditure** | **0** | **660** | **0** | **0** | **(660)** | **0** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| T101 DIRECTORATE ADMINISTRATION | 138,830 | 2,740 | - | - | (141,570) | - |
| U101 E&D ADMIN INTERNAL RECHARGES | (138,830) | (2,080) | - | - | 140,910 | - |
| Net Cost | **0** | **660** | **0** | **0** | **(660)** | **0** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B4 - ENGINEERING/CONSTRUCTION SERVS

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 255,380 | 3,930 | - | - | (8,140) | 251,170 |
| PREMISES | - | - | - | - | - | - |
| SUPPLIES & SERVICES | 13,300 | 80 | - | - | 14,700 | 28,080 |
| TRANSPORT | 3,280 | 70 | - | - | 350 | 3,700 |
| SUPPORT SERVICES | 89,760 | 1,280 | - | - | (11,900) | 79,140 |
| CAPITAL CHARGES | 150 | - | - | - | - | 150 |
| **Total Expense** | **361,870** | **5,360** | **-** | **-** | **(4,990)** | **362,240** |
| | | | | | | |
| INCOME | (361,870) | (3,610) | - | - | 3,240 | (362,240) |
| **Total Income** | **(361,870)** | **(3,610)** | **-** | **-** | **3,240** | **(362,240)** |
| | | | | | | |
| **Net Expenditure** | **0** | **1,750** | **0** | **0** | **(1,750)** | **0** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| T106 ENGINEERING & CONSTRUCTION | 361,870 | 7,180 | - | - | (6,710) | 362,340 |
| U106 ENG & CONST INTERNAL RECHARGE | (361,870) | (5,430) | - | - | 4,960 | (362,340) |
| Net Cost | **0** | **1,750** | **0** | **0** | **(1,750)** | **0** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B5 - PLANNING SERVICES

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 975,750 | 14,780 | (151,360) | - | 85,280 | 924,450 |
| PREMISES | 1,560 | 20 | - | - | (1,580) | - |
| SUPPLIES & SERVICES | 49,130 | 480 | - | - | (4,670) | 44,940 |
| TRANSPORT | 8,540 | 170 | - | - | (430) | 8,280 |
| SUPPORT SERVICES | 460,680 | 6,780 | - | - | (52,200) | 415,260 |
| CAPITAL CHARGES | 4,410 | - | - | - | - | 4,410 |
| **Total Expense** | **1,500,070** | **22,230** | **(151,360)** | **-** | **26,400** | **1,397,340** |
| | | | | | | |
| INCOME | (527,560) | (69,420) | (100,000) | - | 13,430 | (683,550) |
| **Total Income** | **(527,560)** | **(69,420)** | **(100,000)** | **-** | **13,430** | **(683,550)** |
| | | | | | | |
| **Net Expenditure** | **972,510** | **(47,190)** | **(251,360)** | **0** | **39,830** | **713,790** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M801 PLANNING | 718,500 | (50,960) | (225,680) | - | 122,430 | 564,290 |
| M802 PLANNING ENFORCEMENT | 64,790 | 940 | - | - | (65,730) | - |
| M803 FORWARD PLANNING | 137,870 | 2,070 | (25,680) | - | (4,990) | 109,270 |
| M804 PLANNING DELIVERY | 51,350 | 760 | - | - | (52,110) | - |
| M806 LOCAL DEVELOPMENT FRAMEWORK | - | - | | - | - | - |
| M808 COMMUNITY INFRASTRUCTURE LEVY | - | - | - | | 40,230 | 40,230 |
| Net Cost | **972,510** | **(47,190)** | **(251,360)** | **0** | **39,830** | **713,790** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B6 - CONSERVATION

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PREMISES | 43,040 | - | - | - | 65,750 | 108,790 |
| SUPPLIES & SERVICES | 6,300 | - | (6,300) | - | - | - |
| SUPPORT SERVICES | 2,110 | 30 | - | - | (200) | 1,940 |
| CAPITAL CHARGES | 5,850 | - | - | - | - | 5,850 |
| **Total Expense** | **57,300** | **30** | **(6,300)** | **-** | **65,550** | **116,580** |
| | | | | | | |
| **Net Expenditure** | **57,300** | **30** | **(6,300)** | **0** | **65,550** | **116,580** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M811 CONSERVATION/BUILDING GRANTS | 57,300 | 30 | (6,300) | - | 65,550 | 116,580 |
| Net Cost | **57,300** | **30** | **(6,300)** | **0** | **65,550** | **116,580** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B7 - ARCHAEOLOGICAL FIELD UNIT

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 7,920 | 240 | - | - | (7,790) | 370 |
| PREMISES | 34,210 | 1,370 | - | - | 15,490 | 51,070 |
| SUPPLIES & SERVICES | 1,750 | - | - | - | (1,000) | 750 |
| TRANSPORT | 4,680 | 150 | - | - | (3,710) | 1,120 |
| SUPPORT SERVICES | 9,210 | 140 | - | - | 9,200 | 18,550 |
| CAPITAL CHARGES | 4,870 | - | - | - | - | 4,870 |
| **Total Expense** | **62,640** | **1,900** | **-** | **-** | **12,190** | **76,730** |
| | | | | | | |
| INCOME | - | - | - | - | (10,000) | (10,000) |
| **Total Income** | **-** | **-** | **-** | **-** | **(10,000)** | **(10,000)** |
| | | | | | | |
| **Net Expenditure** | **62,640** | **1,900** | **0** | **0** | **2,190** | **66,730** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| C125 CUSTOMS HOUSE | 62,640 | 1,900 | - | - | 2,190 | 66,730 |
| Net Cost | **62,640** | **1,900** | **0** | **0** | **2,190** | **66,730** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B8 - MAJOR PROJECTS

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| SUPPLIES & SERVICES | 75,000 | - | - | - | - | 75,000 |
| **Total Expense** | **75,000** | **-** | **-** | **-** | **-** | **75,000** |
| | | | | | | |
| **Net Expenditure** | **75,000** | **0** | **0** | **0** | **0** | **75,000** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| M821 MAJOR PROJECTS | 75,000 | - | - | - | - | 75,000 |
| Net Cost | **75,000** | **0** | **0** | **0** | **0** | **75,000** |

# SCRUTINY COMMITTEE - ECONOMY

## 83B9 - MARKETS & HALLS

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 329,100 | 5,290 | - | - | (62,120) | 272,270 |
| PREMISES | 360,150 | 11,050 | - | - | (38,580) | 332,620 |
| SUPPLIES & SERVICES | 291,200 | 120 | - | - | 90,370 | 381,690 |
| TRANSPORT | 3,500 | 80 | - | - | (60) | 3,520 |
| SUPPORT SERVICES | 386,160 | 5,770 | - | - | (330,050) | 61,880 |
| CAPITAL CHARGES | 17,030 | - | - | - | - | 17,030 |
| **Total Expense** | **1,387,140** | **22,310** | **-** | **-** | **(340,440)** | **1,069,010** |
| | | | | | | |
| INCOME | (1,562,170) | (25,570) | - | - | 234,920 | (1,352,820) |
| **Total Income** | **(1,562,170)** | **(25,570)** | **-** | **-** | **234,920** | **(1,352,820)** |
| | | | | | | |
| **Net Expenditure** | **(175,030)** | **(3,260)** | **0** | **0** | **(105,520)** | **(283,810)** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| C101 LIVESTOCK/MATFORD CENTRE | (248,670) | (5,450) | - | - | (73,050) | (327,170) |
| C102 MARKETS | 2,560 | (660) | - | - | (15,560) | (13,660) |
| C103 EXETER CORN EXCHANGE | 71,080 | 1,360 | - | - | (15,420) | 57,020 |
| C104 M&H OVERHEADS | 322,350 | 6,330 | - | - | (328,680) | - |
| U105 M&H INTERNAL RECHARGES | (322,350) | (4,840) | - | - | 327,190 | - |
| Net Cost | **(175,030)** | **(3,260)** | **0** | **0** | **(105,520)** | **(283,810)** |

# SCRUTINY COMMITTEE - ECONOMY

## 83C1 - WATERWAYS

| Subjective Analysis | BASE ESTIMATE 2012/2013 | INFLATION | RECURRING | NON-RECURRING | OTHER ADJUSTMENTS | ESTIMATE 2013/2014 |
|---|---|---|---|---|---|---|
| PAY | 118,870 | 1,880 | - | - | 21,400 | 142,150 |
| PREMISES | 174,650 | 1,670 | - | - | 5,780 | 182,100 |
| SUPPLIES & SERVICES | 98,720 | 170 | - | - | (35,730) | 63,160 |
| TRANSPORT | 23,880 | 550 | - | - | 1,160 | 25,590 |
| SUPPORT SERVICES | 100,420 | 1,450 | - | - | (14,220) | 87,650 |
| CAPITAL CHARGES | 38,540 | - | - | - | - | 38,540 |
| **Total Expense** | **555,080** | **5,720** | **-** | **-** | **(21,610)** | **539,190** |
| | | | | | | |
| INCOME | (206,480) | (4,590) | (10,000) | - | (22,750) | (243,820) |
| **Total Income** | **(206,480)** | **(4,590)** | **(10,000)** | **-** | **(22,750)** | **(243,820)** |
| | | | | | | |
| **Net Expenditure** | **348,600** | **1,130** | **(10,000)** | **0** | **(44,360)** | **295,370** |

| Represented By | | | | | | |
|---|---|---|---|---|---|---|
| F029 RIVER EXE | 96,430 | 330 | - | - | 2,160 | 98,920 |
| F030 CANAL | 222,170 | 800 | (10,000) | - | (16,520) | 196,450 |
| F031 EXE ESTUARY REVIEW | 30,000 | - | - | - | (30,000) | - |
| Net Cost | **348,600** | **1,130** | **(10,000)** | **0** | **(44,360)** | **295,370** |

**EXETER CITY COUNCIL**

**SCRUTINY COMMITTEE – ECONOMY**
**17 JANUARY 2013**

**EXECUTIVE**
**22 JANUARY 2013**

**DRAFT CITY CENTRE STRATEGY FOR EXETER 2013-2022**

1. **PURPOSE OF THE REPORT**

1.1 To update Members on preparation of a new City Centre Strategy to cover the period 2013/22.

2. **BACKGROUND**

2.1 The case for a new City Centre Strategy received the backing of the City Centre Management Partnership Board (CCMPB) in May 2012 and initial consideration has been given to key strategic themes and potential project strands during the course of the year.

2.2 The current City Centre Strategy (covering the period 2007/12) has reached a conclusion and a framework is needed to maintain the momentum of City Centre change, renewal and investment for the coming 5-10 year period. The new City Centre Strategy needs to relate to the Exeter Vision and to map out timescales for key developments and activities. An outline timetable for development of this strategy is attached.

2.3 The draft Strategy is very much a discussion document which will inevitably change to reflect the realities of resource availability and the capacity to deliver proposed actions. In short the context for the Strategy is difficult:

- The most significant squeeze on the public finances in decades,;
- A decade of major economic progress for the City Centre – which, in spite of the major contribution to the economic welfare of the city, now provides the challenge of complacency with a widespread view that continued economic progress is a given;
- A likely focus of City Council capital expenditure on the swimming pool element of Bus Station site redevelopment;
- The need for a re-gearing in the relationship between business and public authorities on the funding of ‘city centre management’ initiatives. A Business Improvement District will be an essential pre-requisite for moving forward many of the project strands envisaged in the draft City Centre Strategy.

2.4 A draft City Centre Strategy is attached. It is envisaged that this will provide the basis for in-depth dialogue with a range of stakeholders and key partners. Development of the strategy document will be an iterative process as the views and comments of the key agencies, business community and the City Council are collated during the consultation phase. The Strategy will be overseen by a reconstituted City Centre Management Partnership comprising active representation from the business community covering the relevant sectors and areas of the City Centre, from Princesshay and Guildhall centres, the City Council, Police and County Council. Once agreed each body will need to account for progress on those aspects of the Strategy for which they are responsible.

## 3 STRATEGY CONTENT

3.1 The City Centre Strategy has been drawn together with the following structure:

- A brief introduction on the current City Centre offer, a summary of progress during the last five year period, an assessment of the city centre's current competitive position (including a City Centre SWOT analysis), a summary of key development aims during the next 5-10 years and an Action Plan.

- Strategy purpose – which can be identified as four-fold:
  (1) To provide a clear timetable for the Strategy (to cover the ten year period – up to 2022, although the primary focus is initially on the first 5 years);
  (2) To present a positive case for City Centre inward investment (and re-investment by existing businesses);
  (3) To set out clear aims and project objectives for the CCMP and its partners, including the delivery of a City Centre Business Improvement District which is a critical element of providing the necessary resources for achieving desired progress during the coming 5 year period;
  (4) To clearly set out partners and lead agency responsibilities for the implementation and delivery of the Strategy Action Plan.

- Action Plan targets are summarised under the following key aims:
  (1) Securing and building on Exeter City Centre's competitive advantage.
  (2) Giving a better first impression.
  (3) Delivering a vibrant centre which offers attractions for all.
  (4) Achieving an even safer environment.
  (5) Securing a vibrant, welcoming and safe evening economy.

- A series of projects have been identified that will help deliver progress against the above. Action Plan projects, and indeed the Strategy as a whole will have to strike a balance between aspirations that are challenging yet realistic and priorities which are essential and the means has to be found to deliver them.

## 4. OWNERSHIP & DELIVERY

4.1 For the City Centre Strategy to be successful it must have widespread ownership – and this will need to include a clear commitment to the aims and project delivery from not only City Council units, but also from partners to include Devon County Council, the Police, the business community and Chamber of Commerce. By definition, some project streams have the potential to be challenging to the City Council.

4.2. Draft projects carry a clear indication of lead agency/organisation/business, lead individual, timescale and likely funding streams. Project details at this stage remain very much work in progress.

4.3 The projects list contains a number of aspirations that can be identified as 'kite flying' – it's hoped that this will help secure a period of robust debate and dialogue amongst partners prior to finalisation of the City Centre Strategy in Spring 2013.

5. **TIMESCALE & CONSULTATION**

5.1 The objective will be to secure a published City Centre Strategy by June 2013 although it will be important that the finished document has had sufficient consultation and support before finally being signed off.
.

6. **RECOMMENDED that**

6.1 Scrutiny Committee – Economy

(i) Members note progress on City Centre Strategy development to date and comment on proposed themes and proposed project work streams.

(ii) Members support development of the City Centre Strategy development on the timetable proposed.

6.2 Executive approve the draft City Centre Strategy as the basis for public engagement and consultation with key stakeholders.

**RICHARD BALL**
**ASSISTANT DIRECTOR ECONOMY**

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

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# *Competitive, Attractive, Dynamic – Delivering A Further Decade Of Change, Renewal and Investment A City Centre Strategy for Exeter, 2013-2022*

## *1: Introduction*

1.1 With a retail catchment of over a million people, Exeter is a key, and rapidly expanding, regional centre. The economic, social and cultural role played by the city cannot be underestimated and the rapid expansion of the City Centre – and the city as a whole – over the last decade has the potential to continue during the next decade and beyond. The economic track record of the City as a whole is impressive:

- Exeter is in the top 2% in the UK for its rate of growth in job creation. Between 2000 – 2009, the wider Exeter and the Heart of Devon area created an additional 15,000 jobs, representing a 12% increase and Exeter itself increased by 24%;
- Exeter is an employment hub. In terms of job density where the number of jobs in an area is divided by the number of working age residents, Exeter outperforms most UK locations for job density and is positioned 10$^{th}$ overall in the UK;
- Between 2008 and 2012, Exeter was in the top 10 nationally for job creation; all achieved whilst 76% of all locations throughout the UK saw actual job losses;
- The UK Competitiveness Index confirmed that Exeter has seen the greatest improvement against all other UK locations. With further significant developments planned, the Exeter economy is in a strong market position to grow further.

1.2 Taken alongside the unique combination of natural and historical resources, close proximity to beautiful countryside and strategic transportation links, the strength of the Exeter economy provides a sound base for a further decade of city centre change, renewal and investment. It is critical to recognise, however, that whilst the strength of the City Centre economy – and indeed the city economy as a whole – is a South West success story, the challenge of tackling national misconceptions about Exeter is a very real one.

1.3 The position of Exeter in the UK retail hierarchy is already significant (currently ranked at 38 within the top 50 UK centres). Since 2007 Exeter has made sound progress in securing a strong position within the national retail rankings and against a backdrop of recent changes to the methodology for calculating the retail rankings it is anticipated that Exeter will move on to underline its regional position of strength and cement its position within the premier league of UK cities.

1.4 CACI uses a number of measures to rank UK centres:

a. *Physical distance to (or time taken to reach) the centre*;

b. *The 'Attractiveness' of the centre's facilities'* – scored by looking at turnover from multiples and department stores in each centre, by counting independent comparison goods retailers in each centre and the count of 'footfall generators' (such as banks and restaurants) in each centre;
c. *Level of competition*;
d. *Population, 'Demand' and Spend*.

The CACI retail rankings are increasingly important, with a growing trend towards major retailers focusing their investments in a reducing number of large centres. It's essential that Exeter is in a strong position to continue to attract such investment and securing the highest possible retail ranking will underpin work to secure further retail investment.

There is a real opportunity for Exeter to significantly improve its retail ranking. A top 35 position within the retail hierarchy is the target for Exeter during the next decade, post completion of the mixed use redevelopment of the Exeter Bus and Coach Station – with the focus being to drive the city clearly in to the top 30.

1.5 Although the City Centre has made significant progress in delivering major improvements to its retail offer over the last decade, progress on the leisure and cultural offer has been less dynamic. Redevelopment of the Bus Station site offers an opportunity to start to re-address this imbalance, but next steps of change through West Quarter development will be critical in maintaining the process of achieving the broadest possible City Centre offer. Proposed development of the Bus Station site provides a real opportunity to further improve the attraction of people not just to visit the content of the new development but to make the City Centre even more of a destination for a wider cross section of the population at different times. The benefits are intended to be widespread from an increase in footfall and longer time spent staying and enjoying what the City Centre as a whole has to offer.

1.6 The City Centre acts as a shop window for the city – showcasing the economic vibrancy of the city as a whole and the strength of the local community that underpins that vibrancy. The first and ongoing impressions and experiences that City Centre visitors get provide key messages on whether the city welcomes its visitors and is a good place to stay, on whether it's safe, on whether it's vibrant and fun, on whether it's unique and different (as opposed to identikit and uninteresting) and on whether it's a good place in which to do business and invest.

1.7 The growth in the number of City Centre residents has been a key feature of City Centre development during the last decade – underpinning increased City Centre vibrancy and safety.

1.8 It is vital that the City Centre is seen as ever more welcoming, vibrant, safe and clean and that, through building links with local community organisations, charities, schools and community groups, it also links to the local community and strengthens community loyalty to the City Centre.

1.9 This strategy sets out a vision for the next decade of City Centre change, renewal and investment and, together with the associated action plan, sets out a series of priorities that will be of benefit to Exeter City Centre and all its users. The strategy sits within the context of ‘A City Centre Vision For A Green Capital’ published in April 2011. The City Centre Vision set out:

- a number of development framework principles, designed to emphasise and build on those principles that are, or could be, memorable and great about Exeter;
- “Four Big Moves” or development projects that represent one way of delivering change, within the context of the agreed development framework principles, and driving City Centre development and growth forward.

1.10 This Strategy is owned by the City Centre Partnership – comprising Exeter City Council, Devon County Council, City Centre businesses, Devon and Cornwall Police and key transport providers.

1.11 Importantly, the City Centre Vision recognises the importance of delivering growth and investment whilst at the same time ensuring the City Centre doesn’t lose its fundamental character and appeal. Together with an associated action plan, this City Centre Strategy maps out timescales and specific projects that will move the City Centre towards delivery of key Vision principles and ‘big moves’. The Strategy also sits alongside the Exeter Place Marketing Strategy, the 2012–2016 Exeter Visitor Strategy and the forthcoming Exeter Cultural Strategy 2013-18.

1.12 This strategy document begins with a brief contextual analysis for Exeter City Centre as it is today, summarises key areas of progress against the 2007 – 2012 City Centre Strategy and then sets out both key strategic aims for the period 2013 – 2018 and a clear set of projects within an associated Action Plan. A set of core indicators are set out within the Action Plan which will be used to monitor progress against the Action Plan, with annual progress reports to be considered by the City Centre Management Partnership.

## ***2: Previous Strategy***

2.1 The previous Exeter City Centre Strategy covered the period 2007 – 2012 and set out a vision for a City Centre that:

- built on the things that made it distinctive and gave it competitive edge;
- delivered a positive first impression, particularly in the quality, sustainability and accessibility of its built environment;
- offered facilities and attractions that would enhance the vibrancy, diversity, status and prosperity of the city;
- provided, as a matter of course, a safe environment for all City Centre users.

2.2 Even though the Strategy spanned the period of the most challenging economic downturn in living memory, the period has been one of significant progress for the City Centre:

***Development***

- Princesshay development completed – and a successful launch period followed-up with continuing healthy trading;

***'Retail' Investment***

- the opening of John Lewis;
- the opening of a range of other key retailers including Hollister, Republic, Urban Outfitters and Jack & Jones;

***Travel/Access***

- the refurbishment of King William Street Car Park – and its re-opening as John Lewis Car Park;
- an increase in patronage on both Stagecoach Park & Ride services and the First Great Western Tarka & Avocet lines (Exmouth – Exeter passenger numbers (Avocet Line) grew by 32.4% between 2006/07 and 2011/12 and Barnstaple – Exeter passenger numbers (Tarka Line) grew by 73.2% between 2006/07 and 2011/12;

***Improvements for Pedestrians***

- the delivery of a bigger pedestrianised zone at the heart of the City Centre – creating a much more pedestrian-friendly shopper and visitor environment;
- pedestrian improvements in Paris Street – delivering better connectivity between High Street and Sidwell Street & the Bus Station;
- pedestrian improvements and delivering a significantly improved environment in Sidwell Street;
- the delivery of a more pedestrian-friendly Cathedral Yard and Close;
- the delivery of significant improvements in High Street – making the area a much more attractive shopping environment;

***Economic Performance***

- retail vacancy rates remaining consistently better than the national position, with current rates running at approximately half the national average;

***Visitor Attractions/Improvements***

- significant progress on the delivery of City Centre café culture – with an increase in the number of City Centre cafes and restaurants and a marked increase in the volume of outside seating in areas across the City Centre;
- the re-opening of the Royal Albert Memorial Museum (RAMM), after an extensive – and widely lauded refurbishment (and the awarding of the Museum of the Year 2012 to RAMM);
- the opening of two new City Centre hotels – Southernhay House and The Magdalen Chapter – and the opening of a new Premier Inn at St David's Station;
- the opening of Exeter Visitor and Tickets within the Princesshay development and the opening of a new visitor centre for the city's Underground Passages.

## ***3: Current Position***

3.1 There is much to celebrate about Exeter City Centre – at the heart of an attractive, connected, fast-developing city. Over the last decade, the development of the City Centre has mirrored the development of the city – moving from a place perhaps seen as slightly provincial towards a leading regional centre, with a City Centre that is increasingly the investment location of choice for key retailers west of Bristol.

3.2 There is a fantastic level of support within the city community for the growth and increasing vibrancy of the City Centre – essential as the City Centre continues to negotiate a period of radical change, renewal and investment. In embarking on further change, renewal and investment it is important that we build upon the existing strengths of the City Centre as set out in the bullet points below under the broad aims of the new strategy:

***Aim 1 – securing and building on Exeter City Centre's competitive advantage*** – as *it*

- delivers a good – and constantly improving – mix of national brand names and an excellent range of unique and independent retailers;
- has an extensive catchment area;
- is compact and relatively easy to access, with rail services, bus provision and the Park and Ride facilities, arguably the best of any major centre in the South west peninsula;

***Aim 2 – giving a better first impression*** – *the City Centre has*

- a built environment that is generally good and is getting better, with the delivery of an on-going programme of high-quality public space improvement work;
- valuable green 'lungs' at the heart of the City Centre (Cathedral Green, Southernhay, Northernhay and Rougemont Parks and a range of 'hidden' green pocket spaces across the City Centre);

***Aim 3 – delivering a vibrant centre which offers attractions for all*** – *the city*

- plays host to a unique and vibrant cultural calendar, has experienced strong growth in its food and restaurant sector and, through the recently re-opened award winning Royal Albert Memorial Museum, offers historical and contemporary collections of national significance;
- is undergoing a radical period of redevelopment and change – building on the award winning Princesshay scheme;
- has a rich historic fabric, with the Cathedral and its Close, the wider City Centre and the Quayside providing a unique context for current and future regeneration work;
- lies in close proximity to other significant tourist attractions and some of the most stunning coastal and country locations anywhere in the country;

***Aim 4 – achieving an even safer environment,***

- the city can lay claim to 'safe city' status, with low crime rates and a focus on partnership working to drive crime rates down still further;

***<u>Aim 5 – securing a vibrant, welcoming and safe evening economy</u>***

- Exeter has an evening economy café culture that has grown exponentially over the last decade and continues to go from strength to strength.

3.3 Although there are many City Centre strengths and opportunities, there are weaknesses and threats too. A SWOT analysis of Exeter City Centre is set out in Appendix A. Making progress with the 'big moves' set out within the Vision and delivery of the Action Plan aims and projects will make a major contribution towards addressing the highlighted weaknesses and threats. It is essential that the City Centre is seen not only as a key regional shopping destination, but also that it significantly strengthens its role as a leisure and cultural location of choice.

3.4 Despite the many positives, the physical environment in which Exeter City Centre operates is an increasingly competitive one. It is essential therefore, that the City Centre adapts, expands and develops to meet the challenges presented both nationally and regionally. This City Centre Strategy begins to map out the necessary next steps in realising the aspirations articulated within the 'City Centre Vision For A Green Capital'.

3.5 Whilst Exeter City Centre has continued to markedly improve and cement its regional competitive position during the last decade, the City Centre is susceptible to many of the same risks as other towns and cities across the UK. The threats from the exponential growth of online shopping, from ever-increasing customer expectations around shopping as a leisure activity, from mobile technologies and from recessionary pressures are of major significance. Successful centres of the future must act as more than simple retail and visitor hubs – being innovative and adapting their offer within a constantly changing marketplace.

3.6 The recent Portas Review contains a range of extremely stark statistics – as challenging for Exeter as for other UK town and city centres. Although internet sales currently account for less than 10% of all retail sales some estimates suggest that e-commerce accounted for nearly half of all retail sales growth in the UK between 2003 and 2012, as internet access has become more widespread. Sales over mobile devices (dubbed 'm-commerce') have grown at an extraordinary rate – more than 500% in the last two years. By 2015 we'll see more than £40 billion a year being spent over the internet and through mobile devices, compared with virtually nil in 1997. During the last decade the amount of out-of-town retail floor-space has risen by 30%, whilst the amount of in-town floor-space has fallen by 14%.

3.7 E-commerce and m-commerce clearly pose a threat, but there are opportunities too and an increasing recognition that what matters to retailers is achieving the right blend of on-line and 'bricks and mortar' retailing. It is worth noting that:

- Both Amazon and E-Bay – who have been key leaders in the march of on-line retailing are seeking a presence on the UK High Street;
- Increasingly a number of retailers recognise that a website presence is a key driver for shop sales;

- 88% of consumers purchase ‘offline’ – either as a ‘True Offliner’ (only views products in-store and only buys in-store) (***31%***) or as a ‘RoPo’ (***57%***) (informs purchases online, but buys offline);
- The challenges presented by e-commerce and m-commerce are driving more empowered consumers – empowerment that can be used to the advantage of town and city centres in relation to driving changes to opening hours, the retail experience and retail mix.

3.8 The challenges of e-commerce and m-commerce are in their own right significant, but when layered with the challenges that remain to the UK economy, the threats and challenges to the City Centre economy, and the retail economy specifically, remain significant. The most positive of forecasts for the UK economy show economic growth in 2013 at not much more than 1% and, whilst there is more positive news on retail inflation and consumer spending, the environment for retailers is likely to remain challenging for the foreseeable future. The ‘John Lewis effect’ is, in part, protecting the Exeter City Centre economy from the worst excesses of the UK recessionary pressures, but Exeter cannot remain immune from the challenges facing the UK economy as a whole.

3.9 Exeter City Centre, as with other UK town and city centres, has immeasurable social as well as economic value. With the City Centre acting as a shop window for the city as a whole, some of the underlying social challenges that the wider community faces present themselves in the City Centre and a strong City Centre economy is only possible based on a strong community. The challenge of binge drinking and the impact that has on at least perceptions of safety in the evening is an increasing issue for the community as a whole. A key area for action during the lifespan of the Strategy will be Aim 5 (securing a vibrant, welcoming and safe evening economy), with particular progress needed on this front to ensure the City Centre is the shop window needed for the city as a whole.

3.10 Virtually every member of the city community depends on the City Centre for meeting friends and colleagues, for shopping, for entertainment & cultural activity and for the role the centre fulfils as both a transport hub and a hub for the public services. Individuals depend on the City Centre for jobs. Businesses depend on the City Centre for survival, profits and growth.

3.11 The City Centre offers an abundance of opportunities for growth, local employment, wealth and social interactions that are invaluable to the city. Whilst ‘retailing’ is the economic engine for the City Centre, the continued success and vibrancy of the City Centre will be utterly dependent on the continued loyalty of the city community and that loyalty will only remain if the City Centre clearly delivers as an accessible and sustainable ‘service centre’ for the community as a whole.

3.12 There is no room for complacency about the City Centre, its past success and its value. With convenience and ‘leisure’ shopping likely to become ever-more critical drivers of consumer behaviour, there must be a hard-headed approach to the importance of constant change to remain ‘ahead of the game’.

3.13 It is clear that if the positive momentum behind City Centre change, renewal and investment is to be maintained, the City Centre Strategy and Action Plan projects must undertake the following in order to deliver the aims as set out below:

***<u>1 – Securing and building on Exeter City Centre's competitive advantage</u>***

- Maintain a momentum of change, renewal and investment that builds on the Princesshay and John Lewis developments and ensures the City Centre continues to strengthen its position in the regional and national retail hierarchy.
- Ensure there is a focus on strengthening the whole of the City Centre linear 'urban spine' (from Exe Bridges to the top of Sidwell Street) – reinforcing the city's unique layout and ensuring that all City Centre quarters are strengthened through on-going City Centre investment.
- Ensure Exeter is the investment location of choice for retailers looking to move west of Bristol.
- Ensure there is an environment of encouragement and support for City Centre businesses wishing to invest and strengthen their city presence.
- As part of a wider transport and environmental strategy, reduce peak-hour congestion and address the resulting impact on air quality and the pedestrian environment.
- As part of the transport and environmental strategy, constantly review access to the City Centre, working to ensure the right balance between private cars and public transport and looking at both the supply of City Centre parking and pricing mechanisms – ensuring that the transportation mix encourages visitors and maximises City Centre dwell time.
- Strengthen partnership working, recognising that the most dynamic change and renewal can only be delivered with effective joint working.

***<u>2 – Giving a better first impression</u>***

- Deliver the best possible City Centre 'gateway' experiences (for example at St David's Station & Central Station, at Exeter Bus Station and at Exe Bridges).
- Improve the quality, maintenance and management of public space so that the City Centre becomes an *even* friendlier and an *even more* attractive and accessible place, with the right balance between city vibrancy and 'quiet spaces'.
- Ensure the varied parts of the City Centre feel truly connected – with the City centre an easy and pleasurable place for visitors to navigate and with every encouragement for visitors to discover every unique element of the` City Centre.

***<u>3 – Delivering a vibrant centre which offers attractions for all</u>***

- Keep retail at the heart of the city.
- Do more to ensure that external perceptions recognise the true retail and cultural individuality and character of Exeter City Centre.
- Support the development of creative events and initiatives in the City Centre.

- Focus on creating opportunities and jobs – ensuring that, through investment in skills and training, local people (particularly young people and those wishing to return to work) have the opportunities to share in City centre success.
- Ensure that the City Centre continues to grow in strength as a 'hub' at the centre of the Heart of Devon tourism offer.
- Deliver 'vibrancy for all' – ensuring that the retail and entertainment offer is attractive to all sections of the population.

***4 – Achieving an even safer environment***

- Do more to make people *feel* safe in the City Centre, 24 hours a day.
- Deliver specific projects to tackle head-on the minority of individuals who engage in criminal activity, anti-social behaviour and disorder, both during the day and at night.

***5 – Securing a vibrant, welcoming and safe evening economy***

- 'Connect' the day-time and evening economy – holding more and more people in the City Centre post 6pm.

3.14 It is also clear that the squeeze on public finances will remain for the period of the Strategy and beyond and that without the delivery of a Business Improvement District and the business community fully stepping up to the plate there will be significant difficulties in the maintaining the positive momentum achieved in the City Centre over the last decade.

## *4: Aiming To Turn Vision Into Reality*

4.1 Many Exeter people – and the Exeter business community – are passionate about what they see as 'their City Centre', and 'their High Street'. They will often disagree on what's wrong and what's right with the City Centre, but the passion they hold is a power to harness and generate ideas and innovative proposals for moving the City Centre forward. This Strategy and associated Action Plan will only be marked as a success if it inspires more businesses in the City Centre and those responsible for its development and maintenance as a whole to embrace change and renewal and to work ever more closely together on the delivery of radical management and innovative project delivery.

4.2 Green Vision aims are aspirational, but key to moving the City Centre forward. Of particular importance are the four 'big moves' set out within the Vision. As the momentum of City Centre change and renewal is maintained, it is vital that the Vision is kept in sight as change is delivered.

4.3 The four "Big Moves" – 'Space For Growth', 'Balancing The Effects Of Growth', 'A New Place On The River' and 'A Sense Of Arrival' – provide a framework for the Action Plan. The delivery of Action Plan objectives and projects will make a significant contribution to realisation of the Vision. Further detail on each of the “Big Moves” is set out below.

4.4 ***Space for Growth.*** The most obvious location to extend and develop the City Centre is outside the city walls.

4.4.1 The Development to the east of the city wall adjacent to Princesshay provides a significant opportunity for the next phase of City Centre change, renewal and investment (the East Quarter).

4.4.2 The Bus and Coach Station is one of the key arrival points into the city and redevelopment of the East Quarter will need to incorporate a re-developed bus station offering a much improved arrival experience. Not only will the redevelopment of the ‘Bus Station’ site offer a state-of-the-art new transport interchange, the site offers the city the opportunity to deliver a significantly enhanced City centre leisure offer and the best possible gateway in to the City Centre.

4.4.3 There are a number of different potential forms new East Quarter development could take. Work on moving forward with East Quarter development has already commenced with enhancement of the Paris Street/Sidwell Street junction. There is potential for further improvement of public space at the Paris Street/Sidwell Street junction and for significant further enhancement of Sidwell Street.

4.4.4 Beyond Cheeke Street there would be a transition in character between the new city quarter and ‘St Sidwell’s’ – a mixed use quarter with a reduced scale, local and specialist shopping facilities, food and drink outlets and student accommodation.

4.5 ***‘Balancing the Effects of Growth’.*** Parts of the existing City Centre are not working as well as they could.

4.5.1 In particular, blocks to the west of South and North Streets and the Harlequins Shopping Centre off Paul Street are prime city centre locations that have the potential for significant improvement

4.5.2 Whilst commercially successful, the Guildhall Shopping Centre is a very large ‘inward looking’ development which has blank facades facing out on to two strategically important streets (North Street and Paul Street) and blocks attractive views towards the City Centre.

4.5.3 Investment in the Guildhall area is a critical second “Big Move”. Guildhall development is critical in balancing changes proposed in the East Quarter.

4.6 ***‘A New Place on the River’ & ‘A Sense of Arrival’.*** The third and fourth ‘Big Moves’ relate to the interface between the City Centre and the Rive/Exe Bridges (‘A New Place on the River’) and delivering the best possible arrival points for the City Centre (‘A Sense of Arrival’). The importance of delivering the best possible first impressions for the City Centre is identified as a key Strategy aim.

4.7 ***‘A New Place on the River’.*** This is the most aspirational of the “Big Moves”. There is a recognition that the City Centre largely turns its back on the riverside, with major roads separating the City Centre from the historic Quayside. ‘A new place on the river’ would provide an additional destination at the junction of the spine that runs through the City Centre and the River Exe.

4.8 ***‘A Sense of Arrival.*** A number of key gateways in to the City Centre currently fall short of providing the best possible first impressions of the City Centre.

4.8.1 At present Western Way creates a physical barrier between the City Centre and neighbourhoods in the south-east. Equally, the arrival experience from central rail and bus stations is poor, with surface car parking and a narrow alleyway providing the initial route to the City Centre from St David’s Station and a poor environment to the front of Central Station. The bus station is unattractive and surrounded by post-war development in need of redevelopment.

4.8.2 Opportunities exist for the creation of new public space and development to the front of St David’s Station. At Central Station there are plans for the creation of a new pedestrian-friendly forecourt. Delivery of an excellent Bus Station will be addressed within the context of East Quarter development.

4.9 In addition to the four “Big Moves”, there are a opportunities for environmental enhancements in a number of ‘pockets’ across the City Centre – improvements that would better cement together disparate elements of the City Centre and provide momentum in delivering the more substantial remodelling of the Centre. Pocket areas where change, to underpin bigger strategic change, is needed include:

- Northernhay Place;
- Library ‘squares’ and interconnecting ‘concrete canyons’ of the Cultural, or Castle, Quarter;
- Clock Tower;
- West Street.

4.10 Section 5 of this Strategy document comprises an Action Plan. The Action Plan will be reviewed – and re-issued – on a rolling two year basis throughout the lifespan of the Strategy.

4.11 Action Plan projects are set out within five broad aims:

1 – Securing and building on Exeter City Centre’s competitive advantage;
2 – Giving a better first impression;
3 – Delivering a vibrant centre which offers attractions for all;
4 – Achieving an even safer environment;
5 – Securing a vibrant, welcoming and safe evening economy.

4.12 Delivery of a BID itself will also represent a key work strand during the first part of the Strategy. In addition to unlocking essential funding to enhance the marketing, vibrancy, safety, maintenance and cleanliness of the City Centre, a City Centre Business Improvement Project will also set out to deliver:

- the most effective possible route for ensuring that the voice of business is heard loud and clear during a further decade of radical change;
- a mechanism for harnessing the enthusiasm, vision and ideas of the widest possible cross-section of the City Centre community;
- a ‘shared agenda’ on delivering the City Centre change agenda;
- the best possible environment for nurturing and harnessing the growth potential of independent businesses.

4.13 The Strategy is published at the time of the most significant squeeze on the public finances in decades. Neither core Strategy objectives or projects will be deliverable without a clear re-alignment of expenditure on City Centre enhancements, promotion & marketing, maintenance and competitive positioning between local authorities and the business community. Progress on delivering a Business Improvement District will be an essential step in this realignment.

4.14 Progress on Strategy impact will be measured through a basket of PI measures which will include:

- Retail vacancy rates – monitoring report every other month;
- Car Park ticket sales (City Council) – monitoring monthly, quarterly and annually;
- Park & Ride usage;
- Retail takings benchmark analysis – monitoring quarterly;
- Visitor figures for Exeter Cathedral, RAMM, and other attractions – monitoring monthly/quarterly;
- Footfall monitoring, Princesshay & Guildhall Shopping Centre.

## ***Section 5 – Action Plan***

***Aim 1 – Securing & Building Exeter City Centre's Competitive Advantage***

| Project | Year | Lead Partners | Cost Estimate | Outcomes |
|---|---|---|---|---|
| Business Improvement district (BID) | Autumn 2013 target for BID ballot | Chamber of Commerce<br>City Centre businesses<br>Exeter City Council<br>Devon County Council | BID campaign - £15k | To strengthen the City Centre's competitive position, improve marketing and promotional activity, increase day visitor numbers, increase awareness of the Exeter 'offer' and enhance City Centre safety, security and cleansing & maintenance. |
| Redevelopment of the Bus Station | 2014 start date – Phase 1 | Exeter City Council<br>Land Securities<br>Stagecoach | | To deliver a step-change in the City centre leisure and retail offer and deliver a sate-of-the art bus station and modern swimming pool complex |
| West Quarter Development Strategy | 2015 | Fore Street Business Collective<br>Exeter City Council<br>Devon County Council | | To identify a programme of measures to enhance Fore street and the West Quarter – leading, in turn, to improved perceptions of what the West Quarter has to offer and, in due course, to improvements to footfall and trading levels |
| Customer-convenient trading hours | Annual Progress Report | City Centre businesses<br>Stagecoach<br>Exeter & Heart of Devon Hoteliers & Restaurants Association<br>Exeter City Council | Minimal | To improve the link between the day-time and evening economies and to broaden the character of the latter by strengthening the café culture and extending opening hours. To deliver an improved ambience and reduce the incidence of alcohol-related anti-social behaviour. |
| Street Committees | Annual Progress Report | City Centre businesses<br>Devon County Council<br>Devon & Cornwall Police | Minimal | To strengthen engagement with businesses in 'secondary' retailing areas – jointly identifying promotional strategies, delivering local 'ownership' of the change process and identifying a range of business opportunities. |
| Review of Sidwell Street Market | Options Report – July 2013 | Exeter City Council<br>Sidwell Street Market Traders | | Identification of opportunities for growth and enhancement of Sidwell Street Market within the context of Sidwell Street/Bus Station redevelopment |

| Project | Year | Lead Partners | Cost Estimate | Outcomes |
|---|---|---|---|---|
| Visitor Coach Parking Strategy | Report – July 2013 | Exeter City Council<br>Heart of Devon Tourism Partnership | | To enhance the City Centre visitor experience |
| Retailer inward investment targeting | Reviewable targets list First list 2013 | Exeter City Council<br>Chamber of Commerce<br>City Centre businesses<br>City Centre landlords | £8,000 | To further strengthen Exeter's competitive position by strengthening the representation of significant retail names in the city |
| Park & Ride expansion | | Devon County Council | | To deliver easier access to the City Centre, improving travel options for visitors, shoppers and city workers. |
| Year-round Markets | | Exeter City Council | Nil cost | To deliver increased City Centre vibrancy with a year-round series of specialist markets – building on the delivery of the 2012 Cathedral Christmas Market |
| Improved presentation of vacant retail units | On-going | Exeter City Council<br>City Centre Manager<br>Private landlords | £15,000 | To enhance the visitor experience. |
| Regular PI monitoring and reports | Annual Progress Report | City Centre Manager<br>Exeter City Council<br>City Centre businesses | Minimal | To ensure the decision-making process is well informed, with reliable and up to date information on City Centre performance |
| Sunday Trading Hours | As legislation comes forward | City Centre businesses<br>Exeter City Council | Nil | To capitalise on any long-term changes to the Sunday trading regulations – strengthening the City Centre's competitive position |
| ***Aim 2 – Giving A Better First Impression*** | | | | |
| Central Station Forecourt enhancement | 2013 | Exeter City Council<br>Devon County Council<br>Network Rail | £660,000 | To deliver the best possible first impression to City Centre visitors and ensuring a sense of 'arrival'. |
| West Quarter enhancements | 2015 | Exeter City Council<br>Local businesses<br>Devon County Council | To be determined | To strengthen West Quarter as a key hub of independent businesses and café culture, driving footfall and 'signposting' West Quarter businesses |
| Connecting Fore Street, the 'West Quarter' & the Quayside | 2015 | Exeter City Council<br>Devon County Council | To be determined | To deliver improved pedestrian spaces by improving accessibility through, and minimising the impact of traffic in, the West Quarter. In turn this will strengthen the attractiveness of the area to visitors and shoppers. |

| **Project** | **Year** | **Lead Partners** | **Cost Estimate** | **Outcomes** |
|---|---|---|---|---|
| Exeter St David's Station Forecourt | 2015 | Exeter City Council<br>Devon County Council | | To deliver the best possible first impression to City visitors and to ensure a vibrant space delivering the sense of arrival in a city of regional significance. |
| Street Scene – 'Scores on the Floors' Scheme and other partnership working | 2014/2015 | Exeter City Council<br>City Centre businesses<br>Chamber of Commerce | To be determined | Building on the success of the Food Hygiene Rating Scheme, to encourage businesses to take more care with their own external housekeeping – refuse provision, customer litter, flyposting and graffiti. A scheme that rates and recognises tidy premises should help bring about a cleaner, brighter City Centre and a more attractive and successful trading location. |
| Taxi Forum | 2013 and on-going | Exeter City Council | Minimal – individual project costs to be determined | Recognising that taxis are a critical part of the smooth operation of the City Centre, a developing Taxi Forum will provide the opportunity to strengthen dialogue with the taxi trade and in turn to work with the taxi trade to:<br>❖ Deliver the best possible customer service, with well informed drivers aware of all that the City Centre has to offer, of City Centre attractions and events and of City facilities;<br>❖ Ensure that taxi provision (including the location of City Centre taxi ranks) is convenient and clearly 'signed';<br>❖ Promote a positive and distinctive image for Exeter taxis. |

| Project | Year | Lead Partners | Cost Estimate | Outcomes |
|---|---|---|---|---|
| City Champions/Ambassadors | 2015 | Exeter City Council<br>Chamber of Commerce<br>Exeter & Heart of Devon Hoteliers & Restaurants Association<br>City Centre businesses | Minimal | To ensure that 'city gatekeepers'/first points of contact have a good knowledge of Exeter City Centre (facilities, attractions and history). This will be achieved through provision of targeted training and information to taxi drivers, hoteliers, bus drivers and other 'frontline' staff. In turn, this will lead to improved perceptions of Exeter as 'friendly' and 'safe', leading to increased return visits and trade. |
| Improvement to Cathedral & Quay Car Park/City Centre links through South Street | 2017 | Exeter City Council<br>Devon County Council | Costed programme to be devised | To enhance the visitor experience and significantly improve first impressions of the City Centre |
| City Centre 'Hidden Pockets' (for example Coombe Street, Parliament Street & The Mint) | 2017 | Exeter City Council<br>Devon County Council | Costed programme to be devised | To deliver targeted improvements and signage to the 'interesting' hidden City Centre public spaces, leading to enhanced perceptions of the individuality and diversity of Exeter and enhancing the attractiveness of – and visitors enjoyment of – the City Centre. |
| Public Toilet provision (to include Community Toilet Scheme)<br><br>Consideration to be given to 'Loo of the Year' award scheme in 2014. | On-going | Exeter City Council | Costed programme to be devised | To strengthen provision of public toilets in terms of quality and accessibility – and improve the visitor experience. |
| 'Chuggers' Policy | 2013 | Exeter City Council<br>Exeter Chamber of Commerce<br>Charity Commission | Minimal | To enhance the visitor experience by agreeing controls on 'chugger' activity in the City Centre, with a code of conduct to strike the right balance between charitable donations and the number of pitches, numbers of chuggers and number of days on which 'chuggers' are permissible. |

| Project | Year | Lead Partners | Cost Estimate | Outcomes |
|---|---|---|---|---|
| ***Aim 3 – Delivering a vibrant City Centre that offers attractions for all*** | | | | |
| Castle Quarter – delivery/strengthening of a cultural quarter in the City Centre | 2014 – completion of feasibility study/delivery strategy | Exeter Phoenix<br>Exeter City Council<br>Devon County Council<br>Exeter Chamber of Commerce | Costs to be identified | To strengthen the overall offer of the City Centre – ensuring visitors are encouraged to visit the greatest possible range of city attractions and maximising City Centre dwell time. |
| Street Trading – Review of street trading/street trading regulation across the City Centre | 2013 | Exeter City Council<br>Devon County Council<br>Exeter Chamber of Commerce<br>City Centre businesses | Costs to be identified | To recognise the potential of appropriate street trading to enhance the vibrancy of the City Centre; to use designated street trading and 'street food' areas as a mechanism for drawing footfall in to 'secondary' retailing areas such as Castle Street and the Cultural Quarter & Fore Street and the West Quarter. |
| Review of use of Northernhay & Rougemont Gardens and Southernhay | 2013 | Exeter City Council<br>Exeter Chamber of Commerce<br>Devon County Council | Costs to be identified | Significant opportunities for increasing use of green spaces at the heart of the City Centre, delivering enhanced City Centre vibrancy and making a significant contribution to the safety and attractiveness of key City Centre green spaces. |
| Christmas Market | 2012 – first year | Exeter Cathedral<br>Exeter City Council<br>Exeter Chamber of Commerce<br>Exeter & Heart of Devon Hoteliers & Restaurants Association | Minimal Income opportunities | To strengthen the attractiveness of Exeter as a visitor destination during the Christmas shopping period, with an annual Christmas Market. Year-on-year growth to be delivered. |
| Christmas Lights | On-going | Exeter Chamber of Commerce<br>Exeter City Council<br>Corporate business sponsors<br>City Centre businesses - BID | £70,000 annually | To secure new funding streams that deliver Christmas Lights that are unique, innovative and support the city's competitive position. |

| **Project** | **Year** | **Lead Partners** | **Cost Estimate** | **Outcomes** |
|---|---|---|---|---|
| Renovation and regular Summer use of Northernhay bandstand | 2014 | Exeter City Council<br>Lottery funding<br>Corporate business sponsors | £50,000 | To deliver increased vibrancy in and use of Northernhay Gardens – reducing incidents of anti-social behaviour and encouraging wider use of a key City Centre park. |
| City Centre WiFi and 4G | 2014 | City Centre businesses<br>Exeter City Council<br>Private sector providers<br>City Centre landlords | Costs to be identified | Delivering a more business friendly City Centre. |
| ***Aim 4 – Achieving an Even Safer Environment*** | | | | |
| Expansion of Exeter Businesses Against Crime (EBAC). Annual Improvement Plan | Annually | City Centre businesses<br>Exeter City Council | Nil cost to public sector. Annual costing of improvement plan | To deliver a safer, more welcoming, City Centre and ensuring the City Centre becomes less of a target for shoplifters, criminal activity & anti-social behaviour |
| Extend the EBAC radio network to cover all City Centre pubs and clubs and other venues where appropriate | 2014 | City Centre businesses<br>Exeter City Council<br>Devon & Cornwall Police<br>Licensed Victuallers Association | Minimal cost to Council<br>Cost to business of approximately £450 per radio | To deliver a safer, more welcoming, City centre during the evening period |
| Child Safe Zone – Expanding scheme beyond the Guildhall Shopping Centre/Princesshay scheme | 2015 | City Centre businesses<br>Exeter City Council<br>Devon & Cornwall Police | BID dependent<br>Costs to be identified | To deliver a more family-friendly shopping environment, further strengthening competitive position over other regional shopping locations. |
| ***Aim 5 – Securing a welcoming, vibrant and safe evening economy*** | | | | |
| Deliver active Exeter Night time Economy Group | On-going | City Centre businesses<br>Exeter City Council<br>Devon & Cornwall Police | Costs to be identified on a project by project basis | To deliver improvements to the Exeter evening economy, ensuring the City Centre is an attractive and safe place in the evening for the broadest possible cross-section of the community. |

| Project | Year | Lead Partners | Cost Estimate | Outcomes |
|---|---|---|---|---|
| Top 10 problem premises – regular review and publication of information. A willingness of Responsible Authorities to seek formal reviews where appropriate | On-going | Devon & Cornwall Police<br>Exeter City Council | Minimal cost | To secure the safest possible evening economy environment, ensuring a positive reputation for the City Centre as a visitor destination during the evening and night-time period. |
| To examine the potential of Early Morning Alcohol Restriction Orders | 2014 | Devon & Cornwall Police<br>Exeter City Council<br>City Centre licensees<br>City Centre businesses | Costs to be identified, but likely to be significant.<br><br>Implementation would be likely to result in significant savings in relation to policing costs and cleansing/maintenance costs | A new power that should be considered. Likely to reduce 'pre-loading'. Significant improvements anticipated in safety – and perceived safety – of City Centre. Anticipated impact on broadening-out the attractiveness of the City Centre at night to the widest possible cross-section of the community. |
| H2O Project | 2013<br>On-going development | Devon & Cornwall Police<br>Exeter City Council<br>City Centre businesses | Minimal cost – to be met by individual businesses | Evidence form other locations is that water machines offering free water to customers has a significant impact in reducing drink related anti-social behaviour and crime.<br>An initial trial has been successfully run in the City Centre, with the trial achieving such success that it's being used as a model for Devon-wide action. The objective is now to broaden the benefit in Exeter by ensuring city-wide take-up in clubs and pubs. |
| Taxi Rank Provision | On-going | Devon County Council<br>Devon & Cornwall Police<br>Exeter City Council | Costs to be identified | Rank location, size and management have a major proven impact on safe and efficient dispersal of late-night economy users. |

| Project | Year | Lead Partners | Cost Estimate | Outcomes |
|---|---|---|---|---|
| Licensing of Sex Establishments – Review | 2013 | Exeter City Council<br>Devon & Cornwall Police | Nil | To consider what role sex establishments (sex shops and sexual entertainment venues such as lap-dancing clubs) play in the City Centre. |
| Purple Flag Award | 2014/2015 | Devon & Cornwall Police<br>Exeter City Council<br>University of Exeter<br>Exeter Businesses - BID | Costs to be identified | Achieving Purple Flag status – the measure of the safest and most welcoming UK towns and cities at night – would deliver a range of benefits for the City Centre. Benefits would include:<br>❖ A raised profile and an improved public image for the City Centre;<br>❖ Increased visitor numbers;<br>❖ Increased expenditure;<br>❖ Further reductions in levels of crime and anti-social behaviour;<br>❖ The delivery of a more successful mixed-use economy. |
| Taxi Marshalls | 2015 | Devon & Cornwall Police<br>Exeter City Council<br>University of Exeter<br>Exeter Businesses - BID | Costs to be identified | To secure the safest possible evening economy environment, ensuring a positive reputation for the City Centre as a visitor destination during the evening and night-time period. |
| Betting Shops – Review of Policy/Provision | 2014 | Exeter City Council | Nil | To consider what role betting shops play in the City Centre, ensuring that over-provision does not detract from the core City Centre retailing area. |

| ***STRENGTHS*** | ***WEAKNESSES*** |
|---|---|
| **Exeter Economy**<br>Strength of Exeter professional and business services and business quarters & East Devon Growth Point progress, including the development of Cranbrook<br>**Location**<br>Strategic location within South West Region<br>Proximity to the Coast (particularly the Jurassic Coast World Heritage Site), Exmoor, Dartmoor<br>**Access**<br>Access to, and within, the City Centre is generally good – *although see also Weaknesses and Threats*<br>Good – and improving – rail links<br>Range of key rail services running to heart of City Centre, with excellent access to CBD from Central Station<br>**Retail Mix**<br>Mix of major retailers and independents<br>**‘Townscape’**<br>Compact City Centre ‘core’ – easy to navigate and ‘understand’<br>Attractive hidden ‘pockets’ – such as St Catherine’s Almshouses<br>Historic, interesting, buildings and townscape<br>Cathedral Green<br>**Safety**<br>City Centre generally considered to be ‘safe and secure’<br>Excellent network of CCTV<br>**Eating/Drinking**<br>Great – and improving – mix of good quality cafes and restaurants<br>**Public Art**<br>**Car Parking**<br>Quality of Car Parking stock and amount of user-friendly ‘pay on foot’ parking<br>**Pedestrian Signage**<br>**Park & Ride** – Good, & improving, provision<br>**Facilities**<br>Strong cultural facilities – RAMM, Bike Shed Theatre, Phoenix, Spacex Gallery<br>Good heritage offer – Cathedral, Quayside, Underground Passages, City Centre churches, City Wall<br>Excellent green lungs at the heart of the City Centre – Rougemont, Northernhay, Southernhay<br>**Education**<br>Top 10 University – major driver for City Centre economy | **Access**<br>*Perception* of City centre as challenging to access<br>*Perception* of Exeter as remote form key national population centres<br>**‘Townscape’**<br>Large elements of 50s redeveloped City Centre – specifically Sidwell Street, Bus Station, ‘top’ of Fore Street<br>Blank return frontages on Queen Street, adjacent to High Street<br>‘Presence’ of Guildhall Shopping Centre on Queen Street<br>‘Concrete Canyons’ of Cultural Quarter – Musgrave Row, area around Central Library, Telephone Exchange<br>‘Linear’ City Centre<br>City Centre ‘gateways’ arguably give a poor impression of the City Centre<br>**Park & Ride** – lack of provision to serve northern City Centre catchment<br>**Business Engagement**<br>Lack of a City Centre **BID**<br>**Eating/Drinking**<br>Remaining focus on evening economy businesses with a sole focus on drinking in specific areas of the City Centre<br>**Pedestrian Signage** – questionable as to whether signage drives footfall to ‘secondary’ retailing areas<br>**Facilities**<br>Poor provision for teenagers - & arguably for families with young children<br>**Opening Hours**<br>Poor offer<br>**Retail Mix**<br>*Perception of* ‘Clone City’<br>**Web**<br>Weakness of information on City Centre shopping provision<br>**Public Art** – some needs ‘refreshing’ |

| ***OPPORTUNITIES*** | ***THREATS*** |
|---|---|
| **BID**<br>Support for a City Centre BID will unlock substantial additional income streams for the promotion, marketing and enhancement of the City Centre.<br>**Access**<br>Park & Ride – opportunities from delivery of Park & Ride to serve northern City Centre catchment<br>Strengthening of tourism with increasing capacity of and expansion of Exeter Airport<br>**Gateways**<br>Improvements to key City Centre gateways – Western Way/Paris Street roundabout, St David's Station, Central Station<br>Opportunities for 'gateways' to some shopping areas – specifically Castle Street, Fore Street & 'West Quarter'<br>**Retail Mix**<br>Could be significantly enhanced<br>John Lewis effect<br>Opportunities arising from the development of new, specialist, markets<br>**Opening Hours**<br>Significant opportunity for extending opening hours<br>Connecting day and night time economies<br>**'Public Spaces'**<br>Opportunity to make more of public spaces – specifically Cathedral Green<br>Opportunities from further driving 'pedestrianisation' agenda forward<br>**Townscape**<br>Opportunities to drive more obvious pedestrian 'circuits' to offset disadvantages of 'linear' City Centre<br>'Interpretation' of historic core/City Walls<br>Development of iconic new buildings<br>**More celebration of what's great about Exeter!**<br>**Information & Communication**<br>Opportunities to turn more businesses/business people/city workers in to City Centre 'ambassadors'/'information experts'<br>**Festivals & Culture**<br>Opportunity to grow festivals offer and year-round cultural activity<br>Development of Exeter as a hub for the performing arts within the region<br>**Eating & Drinking**<br>Opportunity to grow reputation of Exeter as a centre for gastronomy<br>**Facilities**<br>Growing the 'Castle Quarter' offer – strengthening interface between RAMM, Phoenix, Library & Castle<br>Improving City Centre hotel offer | **'Townscape'**<br>Large elements of 50s redeveloped City Centre – specifically Sidwell Street, Bus Station, 'top' of Fore Street<br>Blank return frontages on Queen Street, adjacent to High Street<br>'Presence' of Guildhall Shopping Centre on Queen Street<br>'Concrete Canyons' of Cultural Quarter – Musgrave Row, area around Central Library, Telephone Exchange<br>'Linear' City Centre<br>City Centre 'gateways' arguably give a poor impression of the City Centre<br>**Safety**<br>Risk to CCTV effectiveness from staff availability for monitoring<br>Continuing reductions in Police numbers<br>**Opening Hours**<br>Failure to connect day and night time economies likely to result in inability to change 'dynamic' of City centre at night<br>**'Spaces'**<br>'Pedestrianisation' agenda may result in increasing congestion on the edge of the city centre and on key 'cross City Centre' routes<br>**Access**<br>Increases in car parking charges may impact on City Centre's competitiveness<br>Failure of Exeter Airport to reach growth opportunities, with loss of business and tourism to Bristol hub<br>*Perception* of City centre as challenging to access<br>*Perception* of Exeter as remote form key national population centres<br>**Image**<br>Exeter perceived as old-fashioned, traditional & sleepy<br>**Multi Purpose City Centre Venue** – Corn Exchange capacity limiting<br>**Economy/Market Conditions**<br>Ongoing challenges to retailing from tough recessionary pressures<br>Risks to local economy from public sector cuts<br>Reduced visitor numbers to Exeter as a result of people finding cheaper holidaying options elsewhere in the UK/in Europe<br>**BID**<br>Failure of City Centre businesses to support |

# CITY CENTRE STRATEGY
# KEY MILESTONES/DEADLINES 2013

| | JANUARY | FEBRUARY | MARCH | APRIL | MAY | JUNE | JULY |
|---|---|---|---|---|---|---|---|
| **Project Identification/Document Review** | | | | Revisions to projects summary<br><br>Revisions to Strategic elements | | | |
| **Meeting/Committee Consideration** | Draft for public/business consultation to:<br>ECC Scrutiny Committee – Economy **17/01**<br>ECC Executive **22/01** | | | | To ECC Scrutiny Committee, Economy for final ratification **30/05** | To CCMPB (June), ECC Executive (**18/06**) for final ratification | |
| **Consultation** | ← Discussion with Key partners and business community → | | | Assimilation of consultation responses | | | |
| **Launch** | | | | | | | ↔ |

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**EXETER CITY COUNCIL**

**SCRUTINY COMMITTEE – ECONOMY**
**17 JANUARY 2013**

**UPDATE ON THE EXETER VISITOR STRATEGY 2012 – 2016**

## 1.0 PURPOSE

1.1 The purpose of this report is to update members on progress with implementation of the Exeter Visitor Strategy 2012 – 2016.

## 2.0 BACKGROUND

2.1 Executive approved the Exeter Visitor Strategy 2012 – 2016 on 24 January 2012 following comment and support from Scrutiny Committee – Economy during the drafting and completion phase.

2.2 The aim of the Visitor Strategy is to:-
"Further develop the visitor economy in order to create and safe guard employment, through the promotion and development of existing and new visitor facilities, including the Royal Albert Memorial Museum focusing on the strengths of Exeter as a regional cultural centre. The intention is to increase employment and visitor expenditure by a minimum of 5% within the lifetime of the strategy".

2.3 The focus of the Strategy is on sustaining and creating quality jobs within the tourism sector and increasing the profile of Exeter as a vibrant cultural destination, night and day. The appeal of the city has increased since the adoption of the Exeter Visitor Strategy through the opening of John Lewis and the Magdalen Chapter Hotel, the holding of the first Exeter Christmas Market, improvements to city centre public realm and the continued success of the Royal Albert Memorial Museum since re-opening in December 2011. The proposed future development of the bus station site will further improve the appeal of the city to the short break, day visitor and group markets.

2.4 Actions from the Exeter Visitor Strategy form part of the Tourism Unit's annual work programme, to ensure delivery is met through the agreed timeframe.

2.5 Tourism to the city was worth just over £182.4 million in 2011 the most recent comprehensive figures available, which supports an estimated 4,200+ jobs, covering the sectors below. The information below was gathered from the Cambridge Economic Activity model, which shows the value of visitor spend as the latest available figures only released late 2013.

| | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| Type of spend | £ million | £ million | £ million | £ million | £ million | £ million |
| Accommodation | £24.8 | £26.9 | £25.8 | £25.1 | £28.9 | £34.1 |
| Shopping | £46.2 | £47.1 | £49.2 | £47.6 | £47.2 | £50.8 |
| Food & Drink | £43.0 | £44.8 | £45.7 | £44.6 | £46.3 | £49.7 |
| Attractions & Ent. | £16.1 | £17.1 | £16.8 | £16.4 | £16.4 | £18.5 |
| Travel | £17.1 | £18.4 | £18.0 | £17.5 | £19.2 | £21.2 |
| Visiting Friends & Relatives | £10.3 | £11.3 | £9.4 | £8.5 | £7.7 | £8.0 |
| **TOTAL** | **£157.4** | **£165.6** | **£164.9** | **£159.7** | **£166.2** | **£182.4** |
| Total estimated Jobs (supported by spend) | 3,616 | 4,004 | 4,111 | 3,767 | 3,898 | 4,255 |

## 3.0 PROGRESS TO DATE

3.1 The following five priorities were agreed in the Strategy, to be implemented in partnership with the tourism business community in the city and the Heart of Devon Tourism Partnership.

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

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

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

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

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

3.2 An overview of outputs and progress made during 2012 is listed in Appendix 1 under each priority heading. A benchmark set of indicators for measuring progress was set out and based on 2011 figures, which can be seen in Appendix 2.

## 4.0 HEART OF DEVON TOURISM PARTNERSHIP

4.1 Realising the tourism potential of the city goes hand in hand with exploiting opportunities presented within Exeter and the wider area. The key is to have a concerted effort to minimise duplication and where possible, pool resources and maximise promotion through an integrated approach. Work has continued to develop the Heart of Devon Tourism Partnership, which broadly covers the areas of Exeter, East Devon, Mid Devon and Teignbridge.

4.2 Board meetings of the Tourism Partnership occur every two months and discuss current and future planned activities, along with joint projects to be undertaken with Visit Devon and other Area Tourism Partnerships within Devon. Work undertaken by the Heart of Devon Tourism Partnership, current and planned, includes:

- continued website development and promotion (www.heartofdevon.com)
- business support activities
- work with Visit Devon on the promotion of Devon nationally and internationally
- press and public relations, and journalist visits
- national advertising of destination, visitor guide and website
- brochure production, distribution and fulfilment
- visitor and business e-newsletters
- attend national exhibitions to promote the area to the group market
- development of themed promotional campaigns
- recruitment of tourism related businesses within the area to the membership scheme
- marketing and social media training for members

4.3 Over the past 12 months Heart of Devon have been working with two local companies, A Head for PR and Thinkology to promote the area regionally and nationally as set out above, primarily to families, people who have retired and young couples.

4.4 As of December 2012, membership to Heart of Devon stands at 303 businesses, which includes mainly attractions and accommodation providers based within Exeter, East Devon, Mid Devon and Teignbridge. The membership scheme is being reviewed for April 2012, to coincide with the beginning of the new membership year. It is the ambition of the Tourism Partnership to grow the membership base by another 100 businesses by recruiting additional food & drink, activity and retail organisations.

4.5 The Heart of Devon Tourism Partnership will build on work achieved during 2012 and previous years, to promote the area as an affordable destination for families and couples wanting a short break or longer holiday. To help with this, work will continue to develop and promote www.heartofdevon.com, work with regional and national press and trade to further inform them of Exeter and the Heart of Devon and themed campaigns will be researched, developed and implemented.

4.6 Within the Exeter Visitor Strategy, there are actions to promote the area to regional and national group organisers, ensuring that Exeter and the Heart of Devon is included in their itineraries.

## 5.0 CURRENT ECONOMIC CLIMATE

5.1 Initially, the economic downturn was predicted to have had a positive effect on the domestic tourism market, but this has been slow to develop, especially within regional cities. There is still concern within the UK population over the economy and job security, which will more than likely have an impact on spending behaviour within the travel and tourism sector.

5.2 The Olympic Games and Diamond Jubilee were widely enjoyed by the UK population, but domestic holiday trips were down 7% year on year Jan – July 2012, with 1-3 night breaks down by 5% and a 12% decline in breaks of more than 4 nights. Not good news for UK domestic tourism.

5.3 The motivators for holidaying in England are positive – to return to a place liked, go somewhere new, liking England, and the ease v's going abroad. But there are indications of increased levels of disappointment with holidaying at home such as the continued poor weather which contributes to an increased wish to go abroad year on year. The poor weather during summer 2012 caused 16% of people who were due to holiday at home to change their booking.

5.4 The fall out from the financial crisis and the impact on global demand continues. In addition, severe constraints in domestic spending power, and weak demand accompanied by stagnant productivity means the national economy has barely grown since 2010.

5.5 In mid 2012 the UK economy fell back into recession (double-dip) and some commentators have suggested that in the near future a third spell in recession is possible. Low growth is forecast until 2015; the growth forecast for 2013 is a very modest 1%.

## 6.0 PERFORMANCE MONITORING

6.1 A set of key performance indicators were included in the Visitor Strategy as a basis for monitoring trends and the effectiveness of the actions, which are listed within Appendix 2. Figures for 2011 are taken as the baseline for the Exeter Visitor Strategy 2012 – 2016.

6.2 Facilities managed by the Tourism Unit have seen a variation of increases and decreases over the years. This is attributed to changes in visitor booking patterns, the national economic climate and better promotion of a number of facilities.

6.3 The total number of people visiting Exeter Visitor Information & Tickets (EVIT) and the amount of accommodation bookings made through EVIT has fallen, in line with national trends. This is mainly the result of an increase in the usage of the internet and mobile phones, and people booking online before their visit to the area. The centre continues to be used by those wishing to visit the city, and once in the city, to receive information on what there is to see and do and make their stay as enjoyable and stress free as possible. The centre is also heavily used by residents of Exeter to gain information on events within the city, find information on where to take visiting family and friends; and to book for various venues and events.

6.4 Exeter Visitor Information & Tickets opening hours were reduced April 2010 as a budget saving for the City Council. The reduced opening hours have had an impact on the number of people using the centre, but not significantly.

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

6.6 From the most recent Cambridge Economic Impact Model (2011), which can be seen in Appendix 3, it is estimated that tourism is worth in the region of £182.4 million annually to the Exeter economy, an increase of 9.75% from 2010. Some 4,200+ jobs are supported within hotels, attractions, cultural venues, eating out venues and transport facilities within the city representing an increase of more than 10%.

6.7 The main points arising from comparisons from 2010 to 2011 include:

- total actual jobs supported by tourism spend has increased by 11.56%;
- spend from day visitors has increased by 0.13%;
- day visitor trips increased by 11.11%
- spend from overnight stays has increased by 19.48%;
- overnight trips increased by 2.49%
- visits to friends and relatives has increased by 21.95%;
- total tourism spend has increased by 9.75%.

6.8 The Cambridge Economic Impact Model is a useful indicator of trends, but the absolute figures are the results of a model not comprehensive information. With the re-opening of the Royal Albert Memorial Museum and the opening of John Lewis, visitor volume and value figures for 2012 should continue with the rise as experienced in 2011, although the impact of the continuing difficult conditions is likely to have had an adverse effect.

## 7.0 PRIORITIES FOR 2013 – 2014

7.1 The focus for 2013 – 2014 will be on delivering outstanding actions from the Exeter Visitor Strategy, developing the Heart of Devon Tourism Partnership and paying particular emphasis on the promotion of the city in light of the challenging national economic climate. These are broken down into the four strategy priority areas as follows:

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

- Work with Exeter Airport, First Great Western and Stagecoach to undertake 'Welcome Audits' at the main points of entry for visitors to ensure signage and information available is suitable for a friendly and welcoming visit;
- Work with tourism businesses to increase their long term financial sustainability by improving marketing, reducing costs, improving training and working in a collaborative way;
- Work with Devon County Council and the Local enterprise Partnership to develop and promote environmentally friendly ways of travelling to and around Dartmoor National Park, having Exeter as a travel and access hub.

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

- Investigate the potential to introduce ‘meet & greet’ ambassadors for day visiting coaches, guiding visitors to the Information Centre, attractions, shops and eating out venues;
- Undertake a comprehensive visitor survey in Exeter to understand the needs and concerns of our customers/visitors, and non-visitors, to help inform any future development of the visitor experience and promotion of the city;
- Develop existing visitor facilities that are less weather dependent through either events or product development, to extend and increase their appeal to visitors throughout the year;
- Work with existing visitor attractions in Exeter to ensure they understand and respond to the expectations of visitors and residents;
- Research joint multi-attraction passes in other destinations throughout the UK and the potential of introducing a joint pass to Exeter.

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

- Develop a short training programme for taxi companies and their drivers to be ambassadors for the city;
- Ensure that staff working within visitor facilities managed by the City Council are able to transfer skills and experience between facilities.

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

- Promote Exeter through the use of social networking, viral marketing, smartphone apps and new technologies;
- Provide timely, accurate and efficient information on Exeter for visitors, online and through other media sources;
- Review and develop the brand for the promotion of Exeter to the visitor market, complimenting the Heart of Devon brand and securing support and use of the brand with the business community;
- Work with Exeter’s twinning organisations to promote Exeter as a place to visit;
- Introduce tourism ambassadors for Exeter to ensure that the city is recognised as a vibrant cultural destination.

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

- Establish a network of Tourist Information Centres (TIC's) within the Heart of Devon to develop best practice, new forms of income generation, co-ordinated cross selling and cross marketing and to keep TIC's informed of Heart of Devon promotional activity;
- Research and develop activity/adventure tourism to increase the awareness of what there is to see and do within the Heart of Devon.

7.3 The above actions will be delivered through the annual Tourism Unit budget and the resources of the Heart of Devon Tourism Partnership, as shown below.

**8.0 FINANCIAL IMPLICATIONS**

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

| **Tourism Unit Budget 2013-14** | **Net** |
|---|---|
| Tourism Administration | **£151,880** |
| Tourism Marketing | **£63,890** |
| Exeter Visitor Information & Tickets | **£142,230** |
| Exeter's Underground Passages | **£84,580** |
| Quay House Visitor Centre (funded by ECQT) | **£52,860** |
| Red Coat Guides | **£8,850** |
| Heart of Devon Tourism Partnership (external) | **£80,000** |
| **Total** | **£584,290** |

8.2 The budget for the next year is generally as above, unless there are any budget changes resulting from the budget setting process

**9.0 RECOMMENDED** that:

9.1 Members note the progress made with implementing the Exeter Visitor Strategy 2012 – 2016 and support the actions proposed to be undertaken during 2013 – 2014.

**RICHARD BALL**
**ASSISTANT DIRECTOR ECONOMY**

**ECONOMY AND DEVELOPMENT DIRECTORATE**

**Local Government (Access to Information) Act 1985 (as amended)**
***Background papers used in compiling the report:***
1. Report to Scrutiny Committee - Economy 19 January 2012

**APPENDIX 1**

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

| Action | Progress | Output |
|---|---|---|
| Help to deliver sustainable mixed use development in Exeter through the production of a master plan for the development of Exeter Bus Station | Planning application anticipated 2013. | N/A |
| Ensure that suitable visiting coach drop-off and overnight parking is incorporated in future city centre developments, taking into account the increase in visiting overseas coaches | Discussions held with Planning on suitable relocation of coach drop off and parking. | N/A |
| Work with visitor related businesses relocating or opening in Exeter to ensure they receive media exposure locally, regionally and nationally | Park & Ride promotional campaign implemented for the opening of John Lewis. | 40% increase in use of P&R for opening weekend of John Lewis.<br>6% increase in car park tickets sold, Nov 2012 compared to Nov 2011. |
| Work with the University of Exeter and new hotel openings within Exeter to ensure each new facility is promoted to the short break, conference and group market, where suitable | Worked with Magdalen Chapter Hotel to ensure national coverage.<br>Worked with the University of Exeter on the promotion of the opening of the Forum building. | Exeter and hotel featured in Sunday Telegraph, the Guardian, The Times newspaper, Wallpaper, Stylist, Sleeper, foodiepedia.co.uk and numerous trade publications. |

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

| Action | Progress | Output |
|---|---|---|
| Work with the City Development Department to ensure the interpretation, signage and experience of the city's quarters is informative, engaging and accessible | Tourism Unit consulted regarding new interactive panels. | Installation of 3 interactive monoliths due March 2013 – located outside John Lewis, Bedford Square and St Thomas Railway Station. |
| Promote the concept of quality as an attraction to visitors and in terms of the image of the city, to tourism businesses within Exeter & the Heart of Devon | Different images and editorial used to promote Exeter and the Heart of Devon. Encouraged businesses to apply for local and national tourism awards. | RAMM, St Nicholas Priory and Underground Passages receive Visitor Attraction Quality Assurance Scheme (VAQAS).<br>Red Coat Guides, Quay House Visitor Centre and Self Guides Heritage Trails receive 'Places of Interest Award (PIQAS).<br>RAMM wins Museum of the Year 2012 & Devon Visitor Attraction of the Year 2012.<br>Exeter Farmers Market wins silver in the Taste of the West SW Flavour Award for Farmers' Market of the year 2012. |
| Review and develop Exeter Visitor Information & Tickets in light of reduced budgets, to include investigating:<br>• having shared use within the Information Centre with a suitable tourism related business<br>• having attended mobile information point(s) around the city<br>• having unattended visitor information point(s) throughout the city<br>• the use of volunteers within the Information Centre<br>• the benefit of maintaining or increasing tickets sold within the Information Centre | Review of Exeter Visitor Information and Tickets will take place Jan 2013 onwards. | Anticipate outputs from ensuring approach to meeting customer demands are cost efficient and effective in providing information to attract visitors and their expenditure with local businesses. |

| | | |
|---|---|---|
| • increasing income streams | | |
| Support, through promotion, a range of events and festivals that highlight or add to the cultural offering of Exeter | 60,000 copies of Winter in the City and 150,000 copies of Summer in the City produced annually to promote events and festivals.<br>Christmas campaign developed with Express & Echo.<br>Events promoted through www.heartofdevon.com and www.ExploreExeter.co.uk plus the Heart of Devon Twitter and Facebook account. | 91% increase in unique website hits to www.heartofdevon.com in Nov 2011 compared to Nov 2012.<br>11% increase in unique website hits to www.heartofdevon.com for the previous 12 months as a whole. |
| Work with the Red Coat Guide committee in improving the service offered to visitors and groups | 14 new volunteers recruited, due to complete training in April 2013.<br>Improved the Halloween tour but poor visitor turnout, due to severe rain and wind on the evening. | One new tour planned by the Red Coat Guides for 2013 season, to add to the 16 tours already offered. |
| Work with Tuckers Hall on the opening of their new visitor/interpretation facility | Advice and support given to management committee. Facility featured in city tourist publications. | Tuckers Hall opened spring 2012. |

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

| Action | Progress | Output |
|---|---|---|
| Introduce Welcome to Exeter and Welcome to the Heart of Devon familiarisation visits for local tourism facilities and services, primarily aimed at front line staff | New Welcome to Exeter course developed with Exeter College. | Welcome to Exeter rolled out to industry from April 2013 onwards. |
| Ensure that all Tourism Unit frontline members of staff have been trained in Welcome Host, Welcome Host Plus, Welcome Host Gold and Welcome All | All tourism staff trained in courses. | Improved customer service within facilities. |
| Ensure that there is strong support for the tourism and food & drink sector within the Heart of the South West Local Enterprise Partnership for Exeter and the Heart of Devon area | Food & Drink promotional campaign researched and developed, due to be rolled out Jan - Apr 2013. | 26 local businesses taking part in Cream Tea Trail and competition. Winner announced at Exeter Food Festival in April 2013. |
| Work with the Exeter & the Heart of Devon Employment & Skills Board (ESB):<br>• to ensure new hospitality businesses are supported through the recruitment of new staff and ongoing staff development<br>• to help existing hospitality businesses recruit significant numbers of new staff, through either expansion or the opening of a new season<br>• to assist tourism businesses to set up and support apprenticeships<br>• to bid for funding to support and help deliver leadership and management training for hospitality businesses | ESB have worked with Hampton by Hilton Hotel at Exeter Airport to streamline access to employment, training and up-skill local residents to meet recruitment needs.<br>Get Devon Working campaign ran for 6 months through 2012, aiming to support and encourage businesses to recruit young people, promoting the benefits of work experience, apprenticeship and graduate internship schemes.<br>New award for young people launches Jan 2013 to develop core employability skills to prepare them for the needs of the labour market. Award to be piloted with 100 students from January 2013. | Recruitment open event attended by over 100 job seekers, many of which received pre-interview support through Jobcentre Plus.<br>20 “Skills Maps” have been produced in key employment sectors – including Hospitality, Retail and Customer Service.<br>6 sector-focused case studies produced, including 1 for the hospitability sector accessed by employers to increase take-up of apprenticeships and increase opportunities for local job seekers. |

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

| **Action** | **Progress** | **Output** |
|---|---|---|
| Differentiate Exeter from other cities within the UK:<br>• through further promotional activity<br>• developing and promoting events that highlight the unique character of the city<br>• highlighting nearby natural attractions, e.g. Exe Estuary and the Jurassic Coast | Press Release issued on Exeter in terms of tourism investment and development to show investment in times of austerity.<br>Main city events promoted in Heart of Devon Visitors Guide and Visit Devon events guide. | PR featured on<br>4,000 group organisers printed.<br>80,000 visitor guide printed.<br>120,000 Visit Devon events guide printed. |
| Work with the management team of the Royal Albert Memorial Museum to:<br>• promote the newly opened visitor attraction, locally, regionally and nationally<br>• develop short break packages with accommodation providers promoting national touring exhibitions<br>• share expertise and resource in order to improve 'joined up' promotion of the Museum along with other visitor attractions and the city as a heritage and cultural destination<br>• promote the facility as a conference and meetings venue<br>• promote the facility along with others to group organisers and schools<br>• develop joint ticketing of heritage attractions within the city<br>• ensure that a selection of the Red Coat Guided tours incorporate and visit the Museum<br>• ensure that all heritage attractions are cross marketed within each facility, on printed guides and websites | RAMM included in all relevant city publicity, websites and press releases.<br>RAMM added to group organisers booking form and Groups Guide.<br>RAMM added to www.heartofdevon.com/conferences to promote venue for meetings and conferences.<br>ECC run heritage attractions feature in RAMM, Underground Passages, Red Coat Guide, Historic Quayside and Topsham leaflets. | 347,934 visitors since reopening in December 2011.<br>??? meetings held at RAMM since reopening.<br>115 school bookings made at RAMM since reopening. |
| Translate key visitor publications, and or information, (available to download as PDF's) into German, Italian, | Explore Exeter guide translated into languages listed in action. German guide | Translated guides downloaded from www.exeter.gov.uk Sept – Dec 2012: |

| | | |
|---|---|---|
| Spanish, French, Russian, Dutch and Chinese | taken to Bad Homburg for town twinning event.<br>All translated guides available to download from www.exeter.gov.uk | 11 French & German<br>11 German<br>9 Spanish<br>5 Russian<br>3 Dutch<br>2 Italian<br>1 Chinese<br>2,000 German guides printed and distributed in Bad Homburg at a twinning event. |
| Work with the organisers of the Olympic Torch Relay to ensure a safe and enjoyable event is held and Exeter gains national exposure on radio, TV and press | City and quayside events held May 2012. | Exeter featured on national TV, radio and newspapers.<br>8,000 tickets supplied and distributed for Cathedral Green event.<br>An estimated 50,000 people attended the event across five sites in Exeter. |
| Re-design and re-launch the website www.exetershopping.org with an associated promotional campaign | New website launched October 2012 – www.ExploreExeter.co.uk covering Exeter and Topsham.<br>Website used for main call to action for Express & Echo Christmas campaign. | Website stats for 17 Oct – 10 Dec:<br>Unique visitors- 2,232<br>Page views- 8,709<br>Average time on website- 2 mins and 26 secs -<br>Most popular page- "What's on" |
| Develop and implement a plan for the co-ordinated promotion of cultural and visitor attractions and venues (including the Museum) to attract more visitors and exploit their income earning potential | Campaign to be implemented with the launch of the new Exeter Cultural Strategy in Summer 2013. | N/A |
| Audit regional and national tourism websites covering information on Exeter to ensure data is up to date and covers all visitor facilities | Work continues on researching and searching tourism websites referring to Exeter and updating incorrect information. | Websites updated:<br>Visit England<br>Visit South West |
| Work with public transport providers to develop a campaign to promote travel to Exeter:<br>• develop combined travel and attractions ticket | Great Days Out campaign developed with South West Trains to promote Exeter for day visits along their route – to be | Public transport information uploaded onto www.heartofdevon.com and www.ExploreExeter.co.uk |

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|---|---|---|
| • destination information on public transport websites<br>• public transport information on destination website<br>• bus and train station promotion of Exeter<br>• using public transport as a visitor experience, such as the Avocet Line & Jurassic Coast bus | launched 2013.<br>Exeter literature is now displayed within Exeter Bus Station.<br>Agreement sought with FGW on displaying Exeter images within Exeter Central Train Station. | |
| Work with partners to promote Exeter and the Heart of Devon to key overseas destinations that offer the best return on investment:<br>• website development<br>• overseas PR campaign<br>• overseas exhibitions<br>• publicity translated into key overseas languages<br>• journalists visit | Explore Exeter guide translated in 7 languages and available to download from www.exeter.gov.uk and www.heartofdevon.com | Attended celebratory event in Bad Homburg to promote Exeter.<br>7 American journalists hosted Nov 2012.<br>1 Canadian journalist hosted Apr 2012. |
| Work with the University of Exeter Alumni to promote Exeter as a visitor destination | Work will start Jan 2013 with the University of Exeter to promote facilities in Exeter for the Exeter Alumni Reunion in July 2013. | N/A |
| Re-brand the Exeter self-guided heritage trails (Woollen, City Wall and Medieval) to become more user friendly – such as 'Historic Walk' | Re-brand will take place once supplies of leaflets have run low, due to take place summer 2013. | N/A |

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

| Action | Progress | Output |
|---|---|---|
| Work with the organisers of large scale events in the Heart of Devon (such as the Food & Drink, County Show, Folk and other Festivals) in the promotion of the event locally, regionally and nationally | Large events promoted within Heart of Devon website, Visitors and Group Organisers Guide and Visit Devon annual events guide.<br>Events promoted through appointed PR agency. | 4,000 group organisers printed.<br>80,000 visitor guide printed.<br>120,000 Visit Devon events guide printed.<br>Large scale Heart of Devon events sent to 15 journalist requests.<br>The first Exeter Christmas Market held 23 Nov to 16 Dec. |
| Support and encourage the implementation of the Heart of Devon brand throughout Exeter and the rest of the Heart of Devon to build the profile of the 'Heart of Devon' brand in the marketplace | Heart of Devon logo and website link sent to all new and renewing members. | Exeter Christmas Market cabin branded Heart of Devon.<br>Heart of Devon brand incorporated into tourism website www.ExploreExeter.co.uk<br>Heart of Devon brand incorporated into new Topsham leaflet |
| Increase local, regional and national PR of the Heart of Devon area and its members through the appointment of a specialist PR agency to ensure Heart of Devon is featured in regional and national newspapers and magazines | "A Head for PR" appointed to deliver PR campaign and journalists visits to Exeter and the Heart of Devon. | 12 official Heart of Devon Press Releases sent covering Apr – Dec 2012.<br>5 journalist hosted<br>104 journalists requests responded to through Travmedia |
| Commission a regular visitor economic impact assessment for Exeter and Heart of Devon (STEAM, Cambridge or a suitable alternative) | Cambridge Model commissioned May 2012 for 2011 data, for the local authority areas within the Heart of Devon. | 2011 report received Nov 2012, showing 9% increase in visitor trips and spend to Exeter. |
| Work with Devon County Council, relevant Parish Council's and other bodies on the development and promotion of two new Jurassic Coast interpretation centres at Exmouth and Seaton | Promotion of both Jurassic Coast Centres will commence once build is completed. | N/A |
| Work with the Jurassic Coast team in the promotion of the Jurassic Coast (East Devon), to build the profile locally, regionally and nationally as a must visit destination with | Jurassic Coast pages on www.heartofdevon.com updated and refreshed. | N/A |

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| consequential benefit for Exeter and the Heart of Devon businesses | Jurassic Coast to be featured in activity campaign for winter 2013. | |
| Work with Visit Devon and the other Area Tourism Partnerships within Devon to ensure that Devon is featured in Visit England promotional campaigns which will enable Devon to gain exposure through national and international promotional campaigns | National campaigns not signed up to, due to match funding being required (approx. £100k). | N/A |
| Increase the online presence of Heart of Devon, and destinations within, within other official and non-official tourism websites | New portal website developed www.VisitDevon.co.uk to include more links to www.heartofdevon.com | www.visitdevon.co.uk is the top referring website for www.heartofdevon.com 1,279 referrals for Nov 2012. |
| Develop and implement a group marketing campaign promoting Exeter and the Heart of Devon to group organisers | 4,000 copies of the 2012/13 Heart of Devon Group Organisers printed. 2,500 copies sent direct to group organisers.<br>Attending Excursions (London) and the South West Group Travel Fair (Yeovil), both held in January 2013 to promote Heart of Devon for group holidays. | 40% increase in group bookings, 2011 compared to 2010.<br>73 contacts received at Excursions 2011<br>17 contacts collected at the South West Group Travel Fair 2011.<br>5 Press Release's sent to national group magazine and newspapers. All 5 featured. |
| Develop and implement themed consumer marketing campaigns promoting Exeter and the Heart of Devon, taking into account previous research which identified specific target groups - Secure Families, Flourishing Families, Affluent Greys and Educated Urbanites | Summer holiday campaign developed for summer 2012, aimed at families.<br>'Whatever the Weather' campaign implemented for summer 2012, due to severe weather.<br>Exeter Christmas campaign developed with the Express & Echo. | 3,030 page views for Whatever the Weather pages on website.<br>Website stats for 17 Oct – 10 Dec www.ExploreExeter.co.uk:<br>Unique visitors- 2,232<br>Page views- 8,709<br>Average time on website- 2 mins and 26 secs -<br>Most popular page- "What's on" |
| Work with Visit Devon, Visit Cornwall and the 5 other Area Tourism Partnerships within Devon to promote the West Country overseas | Work with Visit England, Visit Cornwall and Visit Devon to encourage journalists to visit Devon. | 7 American journalists hosted Nov 2012.<br>1 Canadian journalist hosted Apr 2012. |
| Work with the Board of Directors of the Heart of Devon Tourism Partnership to ensure a sustainable financial footing | Regular board meetings held to discuss future options for Heart of Devon. | Income targets achieved for year. |

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|---|---|---|
| for the Partnership | | |
| Develop an attractive range of membership benefits for new and existing members of Heart of Devon | Membership scheme and benefits will be reviewed March 2013, for roll out April, the beginning of a new membership year. | N/A |
| Work with the 5 other Area Tourism Partnerships within Devon on joint projects to achieve economies of scale – for example:<br>• Press Release and relations<br>• Website procurement<br>• Advertising<br>• Print<br>• Photography<br>• Business development | A Head for PR appointed to administer Press Releases for Visit Devon.<br>New website launched September 2012 www.visitdevon.co.uk<br>New Devon events Guide being drafted, due to be printed Feb 2013. | 11 Press Release's issued since April 2012<br>www.visitdevon.co.uk website stats, Sep – Dec 2012 compared to same period in 2011:<br>Visits up 3.23% to 194,556<br>Unique visitors up 3.90% to 164,694.<br>120,000 copies of new Devon events guide to be printed and distributed throughout the South West Feb 2013 onwards. |
| Promote the Heart of Devon through the use of social networking, viral marketing, smartphone apps and new technologies | Regular tweets and posts on Heart of Devon social media accounts.<br>Currently investigating the use of apps and mobile websites. | 2,838 Twitter followers and 395 Facebook followers as of Dec 2012. |
| Review the Heart of Devon accommodation inspection scheme to ensure businesses are safe, clean and legal, and to improve the quality of accommodation within the Heart of Devon. Scheme to relate to other existing accommodation inspection schemes throughout Devon | Accommodation inspection scheme to be reviewed March 2013, for roll out April. | N/A |
| Commission a photographer to refresh the Exeter and Heart of Devon photographic library | Tony Cobley commissioned for summer 2012. | 100 pictures received for promotional use for Exeter and also Topsham, Exmouth, Sidmouth, Axminster, Honiton and Tiverton. |
| Within all publicity material promote the national and internationally important natural sites within Exeter and the Heart of Devon, including the Exe Estuary, Jurassic Coast, East Devon Pebblebed Heaths, Seaton Marshes, Axmouth | Information will be included in the next edition of the Heart of Devon Visitor Guide 2012 and Group Organiser Guide 2013/14. | Information has been uploaded onto www.heartofdevon.com |

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|---|---|---|
| Undercliffs and the Blackdown Hills and East Devon AONB. | | |
| Ensure that www.heartofdevon.com includes information on local churches and ancestral tourism | Historical churches within the Heart of Devon researched and copy written. | Information on churches added to www.heartofdevon.com August 2012. |
| Work with conference and meeting venues in Exeter and the Heart of Devon to promote the area as a business tourism destination, activity to include:<br>• Website development<br>• Host journalists and buyers<br>• Issue press releases<br>• Attend buyer days<br>• Direct mail | Members with conference facilities added to www.heartofdevon.com/conferences Working with www.meetDevon.co.uk to promote Heart of Devon for conferences and meetings. | Attended Confex Spring 2012, exhibition to promote conference venues. 6 venues from the Heart of Devon attended. |

**APPENDIX 2**

**Tourism Performance Indicators**

| **Tourism related Performance Indicators** | **2005** | **2006** | **2007** | **2008** | **2009** | **2010** | **2011** | **% + / - from 2005** | **% + / - from 2010** |
|---|---|---|---|---|---|---|---|---|---|
| Number of visitors to Exeter Visitor Information and Tickets | 87,995 | 72,899 | 74,800 | 106,234 | 79,618 | 76,530 | 66,645 | -24.65% | -12.95% |
| **Comment:** | The fall in visitors to EVIT is due to a number of reasons, but particularly with visitors sourcing their own information, booking accommodation and tickets pre-arrival via the internet, the increased use of mobile phones and other devises and reduced opening hours. It is understood the throughput increased figure for 2008 is due to the opening of Princesshay. | | | | | | | | |
| Number of accommodation bookings made in person at Exeter Visitor Information and Tickets | 758 | 648 | 615 | 428 | 413 | 430 | 227 | -70.05% | -47.21% |
| **Comment:** | As above. | | | | | | | | |
| Number of other users of Exeter Visitor Information and Tickets (tel, letter & email) | 23,082 | 28,817 | 26,924 | 40,471 | 44,445 | 40,719 | 23,933 | +3.69% | -41.22% |
| **Comment:** | The amount of people contacting EVIT by phone, letter and email has continued to grow, until 2011, which saw a decline. This was primarily due to the problems with the telephone system not recording calls, this has been resolved with a new telephone system. | | | | | | | | |
| Number of visitors on a Red Coat Guided Tour | 12,912 | 14,617 | 18,114 | 17,204 | 16,125 | 15,221 | 14,985 | +16% | -1.55% |
| **Comment:** | The Red Coat Guides are dependant on good weather and due to us having a number of bad summers visitor figures have shown a decline. 2008 was the 20th anniversary of the Red Coat Guides. | | | | | | | | |
| Number of visitors to the Quay House Visitor Centre | 23,471 | 26,048 | 24,561 | 26,123 | 25,060 | 23,579 | 25,039 | +6.68% | +6.19% |
| **Comment:** | The same as above, due to continuous bad weather during the summer visitors to the Quay fluctuate each year. The refurbishment and new signage for the Quay House Visitor Centre has helped raise the awareness of the visitor attraction on the Quayside and boost visitor figures. | | | | | | | | |
| Number of visitors to the Underground Passages | 18,459 | Closed | 4,753 | 19,863 | 18,896 | 19,517 | 20,554 | +11.35% | +5.31% |
| **Comment:** | 2011 has been the best performing year for the Underground Passages. This is attributed to continued promotion of the visitor attraction and better pedestrian signage on Paris Street. | | | | | | | | |

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|---|---|---|---|---|---|---|---|---|---|
| Number of visitors to RAMM | 233,408 | 247,000 | 192,025 | Closed | Closed | Closed | 32,574 (door) 285,673 (out n about) | N/A | |
| **Comment:** | 2012 will be the first full year of opening for RAMM. Visitor figures, as of early December, for 2012 are 344,442. | | | | | | | | |
| Number of visitors to Exeter Cathedral | 187,000 | 142,000 | 170,000 | 131,741 | 109,778 | 108,869 | 110,783 | -40% | +1.76% |
| **Comment:** | During 2008 Exeter Cathedral introduced an admission charge, previously visitor numbers were estimated. Since an admission charge was introduced, visitor figures have remained steady and have actually increased by 0.92%. | | | | | | | | |
| Number of visitors to St Nicholas Priory – A Tudor Home | Closed | Closed | Closed | 6,763 (Apr - Dec) | 8,404 | 5,113 | 4,762 | -29.59% | -6.86% |
| **Comment:** | Compared to the first year of opening in 2008, visits to St Nicholas Priory have declined by 29%. During 2008 there were many free events funded by HLF and were a requirement of the capital grant for the refurbishment and redisplay. Also an education team ran schools sessions, as RAMM was closed, many of our children's activities took place in the Priory. | | | | | | | | |
| Number of visitors to Topsham Museum (Easter – Oct) | 9,070 | 8,461 | 8,932 | 11,512 | 12,711 | 12,145 | 11,441 | +26.14% | -5.80% |
| **Comment:** | A new Topsham leaflet was introduced 2008 to assist with the promotion of the town and museum. 2011 saw a 5% decline in visitor numbers compared to the previous year, this is attributed to the adverse weather resulting in less people visiting Topsham. | | | | | | | | |
| Number of group bookings made through the Tourism Unit | 334 | 363 | 445 | 500 | 486 | 425 | 597 | +78.74 | +40.47% |
| **Comment:** | Promotion of the area to the group market continues to show positive results, with the amount of groups visiting Exeter. | | | | | | | | |
| Number of unique visitors to City Council website www.exeter.gov.uk/visiting | 33,087 | 30,312 | Not know | Not known | Not known | 196,456 (May-Dec) | 223,033 | +574% | +13.53% |
| **Comment:** | Unique visitors to the tourism pages on the City Council website continues to grow, it is one of the most popular section of the website. The website pages are continually refreshed and updated. | | | | | | | | |
| Number of unique visitors to Tourism Partnership website www.heartofdevon.com | 24,107 | 25,596 | 40,108 | 39,406 | 102,547 | 119,442 | 143,099 | +493% | +19.81% |
| **Comment:** | Unique visitors to www.heartofdevon.com have grown year on year since it launched. This is primarily down to frequent updates, relevant information on the website and continued work on implementing keywords and phrases on the homepage. | | | | | | | | |

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| Number of inbound visitors to Exeter Airport | | | 1,012,000 | | | | | | |
| **Comment:** | Awaiting date from Flybe | | | | | | | | |
| Number of Exeter Park & Ride users | 2005/06 1,162,953 | 2006/07 1,219,993 | 2007/08 1,326,193 | 2008/09 1,374,685 | 2009/10 1,364,493 | 2010/11 1,432,606 | 2011/12 1,264,581 | +8.74% | -11.73% |
| **Comment:** | Exeter Park & Ride showed a steady increase up to the financial year 2010/11, the decline for is partially attributed to the downturn in the economy with less people using the service. | | | | | | | | |
| Number of car park tickets sold in ECC car parks | 2,745,149 | 2,606,467 | 2,857,885 | 2,471,346 | 2,483,278 | 2,364,835 | 2,322,630 | -15.39% | -1.78% |
| **Comment:** | Exeter's car parking figures fluctuate year on year, the overall decline is attributed to the downturn in the economy with less people parking in the City. | | | | | | | | |

The number and value of accommodation bookings made through our tourism website were part of the original performance indicators. The live accommodation booking facility went live early 2011, but we came across numerous difficulties with accommodation venues reluctant to upload 'live' availability. This initiative will be suspended until the technology allows.

**APPENDIX 3**

**Economic impact of tourism within Exeter**

| | 2009 | 2010 | 2011 |
|---|---|---|---|
| Direct actual jobs | 2,882 | 2,958 | 3,201 |
| Indirect actual jobs | 884 | 856 | 1,054 |
| TOTAL ACTUAL JOBS | 3,767 | 3,814 | 4,225 |
| Bed spaces | 6,703 | 7,401 | 7,625 |
| | | | |
| Day visits | 1,568,000 | 1,539,000 | 1,710,000 |
| Day visitor expenditure | £79.5 million | £77.4 million | £77.5 million |
| Overnight trips | 360,000 | 442,000 | 453,000 |
| Overnight expenditure | £71.6 million | £81.1 million | £96.9 million |
| Visits to friends & relatives | 193,000 | 164,000 | 200,000 |
| Other tourism expenditure | £8.6 million | £7.7 million | £8.0 million |
| | | | |
| TOTAL VISITOR TRIPS | 1,928,000 | 1,981,000 | 2,163,000 |
| TOTAL VISITOR EXPENDITURE | £159.7 million | £166.2 million | £182.4 million |

Cambridge Economic Activity Model

**EXETER CITY COUNCIL**

**SCRUTINY COMMITTEE – ECONOMY**
**17 JANUARY 2013**

**SUPPORT FOR SMALL BUSINESSES**

## 1.0 PURPOSE

1.1 To provide Members with a brief overview of provision in Exeter for business support including the contribution made by services funded by the City Council and recommend changes in delivery to assist small businesses to start up, survive, and grow.

## 2.0 BACKGROUND

2.1 In order to sustain Exeter's economic strength, it is important to assist those small businesses which are struggling, encourage and support new businesses to replace those that have ceased trading, to create new or perhaps better employment opportunities, and to enable the economy to respond to changing economic circumstances.

2.2 The generation of new social enterprise businesses is also important to help strengthen and diversify the local economy. Social enterprises are businesses that principally have social objectives, with any profits achieved ploughed back into the business or into the community. In essence, the efforts of the social enterprise are invested into providing social benefit not for private financial gain.

2.3 In March 2012 this Committee received a report on the Council's funding of free professional advice and guidance support for small businesses and social enterprises in Exeter. The report proposed that assistance should still be available to those looking to start up in Exeter but an increasing emphasis on support should be given to clients who had been assisted to start up in the previous 2 years of trading. The aim was to provide additional support to clients during the economy's challenging trading conditions.

2.4 The Council funded business adviser works with colleagues in the University's Innovation Centre and meets clients primarily in the Customer Services reception area providing services under the banner of Exeter Business Support. This is a partnership consisting of Peninsula Innovations Limited (PIL), which is responsible for the management of the University's Innovation Centre, Exeter College's Business School, and the Fruit Tree for Business. Exeter Chamber of Commerce and the Exeter branch of the Federation of Small Businesses support the Partnership. The Fruit Tree for Business is contracted to deliver support to new or existing social enterprises.

2.5 The range of expertise offered by Exeter Business Support and that provided for innovative/high growth businesses has the additional benefit of ensuring expertise is available across a wide spectrum of business needs in the city that encompasses support for pre-starts, start-ups, and existing businesses; from privately owned entities to social enterprises, co-operatives, and mutuals.

2.6 As part of the Council's contribution towards business support a range of other activity is also provided directly or in partnership with other organisations. These include: information for businesses on the Council's website including the on-line commercial property register, the Exeter Business Centre (Marsh Barton), the retail shops leased by Estate Services, partnership activities with the Employment and Skills Board and the implementation of the Place Marketing Strategy, promoting the city for investment.

2.7 However as the landscape of business support provision has changed both nationally and locally, the marketplace has now become confusing to referral agencies and clients in the city. To help offset the lack of clarity and to address gaps in provision, changes to the delivery of Exeter Business Support are proposed within this report.

## 3.0 UPDATE

**Nationally**

3.1 Business Link as the Government's nationally supported programme and provider of support for small businesses has ceased altogether, and support is only available on-line via one website, https://www.gov.uk. There is no longer central provision of a call centre providing access to telephone support.

3.2 A "Business Finance Taskforce", which was set up by the British Bankers' Association operates a separate on-line tool at www.mentorsme.co.uk . This portal enables individuals to search for help for businesses at different life-cycle stages and is available as an offer at county and national level. However, according to a survey in September 2012 by the Department of Business (BIS) some 23% of small and medium sized businesses are aware of the service, and only 3% used it.

3.3 According to an October 2012 survey by 'Cobweb,' a business information website for businesses, business support and advice organisations have been experiencing record levels of demand for their services, particularly from start-ups and pre-starts and those small businesses struggling to survive.

3.4 A report by the Financial Times in November 2012 may shed light on where the demand comes from; according to their research people aged over 50 years and older have accounted for more than 80% of the increase in self-employment since 2008

**Locally**

3.5 Research undertaken by Experian entitled, 'BBC Local Growth Research' (February 2012) 'looked at evidence for growth between 2010 and 2012 in every local authority area in England.' Exeter in particular performs well in the region and is within the top 10 local authority districts 'in the country that possesses 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.'

3.6 The Office for National Statistics (ONS) statistics for Exeter highlight that on average around 360 new enterprises start up in the city every year. The survival rates of new businesses in Exeter in the first year of trading are 88% (England and Wales 87%) but fall off in subsequent years of trading. By year 2 it hovers around 75% for Exeter and 74% for England and Wales. By the $5^{th}$ year of trading, around 51% are still in business within Exeter, and 45% across England and Wales. These "failing" businesses, particularly as the economy continues to experience tough trading conditions, are likely to benefit from further business support. However, achieving awareness of the service requires a higher profile via marketing.

3.7 Provision of business support services by other organisations in Exeter has been summarised within Appendix 1. The appendix contains two tables which highlight the range of support available by type of businesses supported and services offered. Some information is being sought but has yet to be provided, hence why some cells within the tables are empty.

3.8 Initially, most providers provide free limited access to their services which is largely tied to support those individuals looking to start traditional small businesses (pre-starts). Individuals claiming Job Seekers Allowance (JSA) can, if they secure support via the Government's New Enterprise Allowance, receive 6 months of free support once they have commenced trading (see Appendix 1 – West Devon BIP). However, for the majority, on-going support is fee-based. Struggling businesses may not be able to afford access to advice that could make the difference to their survival and growth. In addition, existing small businesses, and those looking to start-up often lack adequate access to finance.

## 4.0 Exeter Business Support

4.1 As reported in the previous Committee, officers have explored with neighbouring local authorities the potential to secure funding and resurrect the establishment of integrated business support across all or parts of Exeter and the Heart of Devon. This has not been realised, for example, Mid Devon and East Devon commission their own separate small business support services.

4.2 The table below summarises the outputs secured from Council funding. The results reflect the change in service delivery reported in March 2012 focusing more on new start-ups and existing small businesses and includes assistance to clients from the previous two financial years.

| Outputs secured from Council funding for business support services | April 2011 – March 2012 | April 2012 – November 2012 | Target |
|---|---|---|---|
| **Traditional businesses supported** | | | |
| pre-start businesses assisted: | 159 | 80 | 120 |
| small businesses assisted to start-up | 45 | 28 | 20 |
| recent start-ups and existing businesses | 51 | 113 | 70 |
| number of jobs created | 49 | 29 | 40 |
| participants at workshops | 224 | 142 | N/A |
| on-going support for 2010/2011 and 2011/12 start-ups | N/A | 61 | 70 |
| **Social enterprise businesses supported** | | | |
| pre-start businesses assisted: | 67 | 15 | No Target Set |
| small businesses assisted to start-up | 8 | 3 | 5 |
| social enterprises in the pipeline to start-up | 6 | 2 | No Target Set |
| recent start-ups and existing businesses | 15 | 9 | 20 |
| number of jobs created | 15.45 FTE | 2 FTE | |
| on-going support for 2010/2011 and 2011/12 start-ups | 8 | 13 | 20 |
| Additional funds leveraged for clients | £80,600 | £3,000 (£20,000 in the pipeline) | £10,000 |

4.3 The client profile of those people looking to start up or are trading as a traditional businesses or as a social enterprise is, broadly speaking, as follows:

- for traditional businesses
  - pre-starts – some 70% have been unemployed and 30% have been or been in the process of being made redundant;
  - around 75% have been trading for up to 2 years
  - around 25% have been trading for over 2 years

- for social enterprises
  - pre-starts – the profile of clients is split 50-50 unemployed/facing redundancy
  - around 80% have been trading for up to 2 years
  - around 20% have been trading for over 2 years

4.4 Business advisers have informed officers that some small businesses struggle for more than 2 years before they are in a position to prosper and therefore may be unable to pay for fee-based services on offer from providers within Exeter.

4.5 In terms of gender, age and ethnicity, the breakdown for 2012/2013 is as follows:

- for traditional businesses
  - 59% male, 41% female
  - 59% aged under 44; 37% aged 45 to 54; 4% aged 55 years and over
  - 95% white and 5% black and minority ethnic communities (ONS population estimates for Exeter are 93% white and 7% are from black and minority ethnic communities (BME)

- for social enterprises
  - 38% male, 62% female
  - 54% aged under 44; 31% aged 45 to 54; 15% aged 55 years and over
  - 85% white and 15% black and minority ethnic communities

4.6 Appendix 2 contains an illustrative list of typical small businesses and social enterprises assisted by the services funded by the City Council. These include a range of business to business services, retail, IT, education and training, arts and health related rational businesses and social enterprises.

4.7 The services funded by the Council deliver a range of intensive one to one support, which is dependent on need and given to small businesses facing challenges and includes the following:

- business health check & recovery strategies to assist with finance and cash flow
- assess client's research and evaluate business viability
- conduct detailed financial analysis to help prepare strategies for survival
- review effectiveness of marketing, helping to develop strategies for growth
- conduct site visits of client's main premises to identify income generating ideas to 'sweat their asset' and make it produce a financial return
- keep clients informed of new resources, business developments and funding options
- provide detailed feedback on clients' draft submissions to various agencies and potential funders
- advise on changes to business structure, e.g. from sole trader to limited company
- independent business assessments for clients facing change, provide reports for management on suggested priorities and remedial actions

4.8 With regard to sustaining small business clients which have started in the previous two years, the survival data is set out in the table below. Survival rates for traditional businesses are lower than as reported in section 3.6 above highlighting the need for support during businesses formative years.

| Survival data for Council funded business support services | | |
|---|---|---|
| Support given to traditional businesses | 2010/2011 (up to 2 years trading) | 2011/2012 (up to 1 year trading) |
| Still trading | 44% | 80% |
| No response/status unknown | 44% | 6% |
| Ceased trading | 12% | 18% |
| Support given to social enterprises | | |
| Still trading | 80% | 70% |
| No response/status unknown | 0% | 10% |
| Ceased trading | 20% | 20% |

4.9 Outputs from April to November 2012 from the University Innovation Centre's assistance to hi-tech businesses provided under the partnership banner of Exeter Business Support are as follows:

| | |
|---|---|
| pre-start businesses supported | 31 |
| small businesses assisted to start-up | 5 |
| recent start-ups and existing businesses supported | 43 |
| jobs created | 21 |
| people had their business skills developed | 35 |
| business network sessions – involving around 795 participants | 18 |
| investment raised by Innovation Centre businesses | £605k |

4.10 Over the last financial year, 30 of the business tenants within the Innovation Centre saw a turnover in the region of £15 million, collectively employing over 170 staff.

**5.0 PROPOSAL**

5.1 There is a need to clarify to referring agencies and potential clients the nature and provision of advice and guidance for small businesses in Exeter. There is also a need to continue raising awareness of advice and support available from Exeter Business Support tailoring the provision from these Council funded services to fill any important gaps in the local market place.

**Awareness and Clarity**

5.2 Currently the services funded by the Council refer clients to each other to ensure the most appropriate support is provided. There is an opportunity to provide a better service to the clients by officers facilitating regular communications/meetings with providers listed in Appendix 1. It is hoped that by regularly sharing information, ideas and working practices a more effective collaborative network of support for small business growth will arise.

5.3 In addition it is proposed that officers :

- focus systematically on increasing awareness amongst the network of other providers, banks, accountants, the Chamber of Commerce, Exeter Federation of Small Businesses and Exeter Business for Communities about the arrange of services available from Exeter Business Support
- explore with those organisations that provide finance for small businesses such as Fredericks Foundation, Virgin Money and Peer-to-peer lending bodies how they might create a framework which improves access to finance in Exeter

**Tailoring Provision**

5.4 As reported earlier, market provision across Exeter for pre-start, is largely covered by free or low cost fees charged by providers operating in the city. However, some individuals may:

- find the duration of support is insufficient to meet their business start up needs
- lack insufficient income to afford even a modest fee to pay for advice and guidance
- not meet the eligibility criteria for free support, e.g. not claiming JSA or they fall out side the age range for assistance from the Princes Trust or PRIME

5.5 Therefore, whilst it is proposed that Exeter Business Support continue to provide pre-start assistance, the offer should be adapted for the 2013/2014 financial year and advisors should in any initial contact with an individual, quickly diagnose their ability to pay fees. Those for whom other services are available and potentially can afford to pay should be signposted to fee-charging providers.

5.6 There remain gaps in market provision for recent start ups and existing small businesses. Exeter Business Support should fill these gaps and/or continue to assist:

- individuals claiming JSA in receipt of the new enterprise allowance post their 6 months of support provided free of charge via West Devon BIP (see Appendix 1)
- recent start-ups trading up to 2 years who have been previously supported by Exeter Business Support
- struggling existing small businesses unable to pay for professional advice

5.7 To help build on growth in the local economy the service providers – Peninsula Innovations Limited and the Fruit Tree for Business will need to look for and identify individuals and local small businesses with high growth potential for job creation. In addition they will need to identify and help struggling businesses to survive and grow and for some also advise them on how to shift their market position to tap into new income sources.

5.8 To this end, it is proposed that the following types of small business clients are supported:

- pre-starts not supported or eligible for assistance with other providers
- start-ups (0 – 2 years of age)
- those which are struggling to survive and unable to afford fees charged by other providers
- those with growth potential (businesses that are not eligible for the Growth Accelerator programme or can afford the fees - see appendix 1)

5.9 One to one sessions should still be provided. However, in order to maximise the use of business adviser time and their effective reach to more clients, a 12 month programme of regular repeat workshops will be offered. The workshops will be promoted, particularly via the referral network outlined in section 5.3 above, as a calendar of events. The workshops will be delivered via three "business/enterprise clubs" and involve other local stakeholders such as HMRC, Trading Standards, legal, and accountancy practices etc in delivering sessions.

5.10 Officers will meet regularly with the Council funded service providers in order to monitor performance and adapt service delivery should local support provision materially change.

**6.0 FINANCIAL IMPLICATIONS**

6.1 In 2012/2013, Peninsula Innovations Limited (PIL) contributed just over £81,000 to the delivery of services supporting innovative and high growth businesses under the banner of Exeter Business Support. PIL intends to contribute £81,000 in 2013/2014.

6.2 The cost to the City Council to fund business support and the programme of social enterprise support for 2012/13 is £42,000 and £25,000 respectively. The funding has been met from the Economic Partnerships Initiatives Budget.

6.3 It is proposed that the City Council continues its support at the same level in 2013/14.

**7.0 RECOMMENDED that:**

7.1 The positive contribution made by the Council to supporting local businesses to start up and in the first 2 years of trading be noted;

7.2 Council continue funding £42,000 and £25,000 respectively for the provision of small business support and social enterprise support;

7.3 Officers be authorised to negotiate service level agreements for 2013/14 with Peninsula Innovations Limited and The Fruit Tree for Business for the continued delivery of services outlined in the report.

**RICHARD BALL**
**ASSISTANT DIRECTOR – ECONOMY**

**Local Government (Access to Information) Act 1972 (as amended)**
***Background papers used in compiling this report:-***
1. "Support for Small Businesses" – Economy Scrutiny 8 March 2012

**APPENDIX 1**

| Provision of business support in Exeter – type of enterprise assisted | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Provider** | **Pre- Start** | **Start-up** | **Existing** | **Technology** | **Hi Growth** | **Social Enterprise** | **Co-ops** | **Social Business/ Entrepreneurs** |
| **1. BAS** *(Chartered Institute of Accountants)* | √ | √ | √ | √ | √ | √ | √ | √ |
| **Notes/Limitations to Service** | Initial free business advice session from a member of ICAEW; charges are dependent upon the individual accountant. | | | | | | | |
| **2. Business West** | √ | √ | √ | √ | √ | √ | √ | √ |
| **Notes/Limitations to Service** | The programme started in April 2012, and is a 3 year programme part-funded by the Regional Growth Fund, ending in March 2015. Monthly Ready for Business pre-start workshops are held in Exeter free of charge; a free business diagnostic is offered for all attendees to work out how viable their business idea is and to see if the programme might be supportive for them in getting started and securing funding. The initiative started in Exeter September 2012; thus far, they have worked with 15 clients in Exeter; they anticipate they will support around 80 clients in 2013, with about 25 businesses starting to trade. Of the clients helped to date, 3 were unemployed, 2 had been made redundant, 8 were existing employees; to date 60% female clients, 40% male.<br>**Fees:** Should a candidate wish to progress through the programme; there is a fee of £600 to gain business support in getting their business plan and the business started along with assisting them in getting funding if required. | | | | | | | |
| **3. Exeter Business Support** | √ | √ | √ | √ | √ | √ | √ | √ |
| **Notes/Limitations to Service** | Unique provider of services to all clients regardless of status - job clubs/enterprise clubs being run successfully by the business advisor | | | | | | | |
| **4. Growth Accelerator** | | √ | √ | √ | √ | | | |
| **Notes/Limitations to Service** | Since April 2012, 24 businesses in Exeter have registered their interest in the Growth Accelerator service; according to the providers, this number continues to rise. Of these clients, 3 were looking for Access to Finance; 3 were looking for Commercialising Innovation and 18 were looking for Business Development. In terms of support given: 3 decided not to take up Growth Accelerator support, one is currently on hold and the other 20 are all in the process, moving towards coaching support; 10 have already actively received coaching support and two more started in December 2012.<br><br>The service provides no free support. To be eligible for support there must be high growth potential (20% growth). The offer is up to 7 days worth of business coaching supported by a programme of workshops and master classes. The investment for companies who wish to participate ranges from £600 for a business with up to 9 employees, £1,500 for a business with 10-49 staff, to £3,000 for a business with 50-249 staff. | | | | | | | |

| Provision of business support in Exeter – type of enterprise assisted | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Provider** | **Pre- Start** | **Start-up** | **Existing** | **Technology** | **Hi Growth** | **Social Enterprise** | **Co-ops** | **Social Business/ Entrepreneurs** |
| | Each coaching intervention could last anywhere between 4 – 12 months depending on the needs of the business and their schedule. Leadership and management funding (up to £2,000 of match funded support for each person on the senior management team), an Intellectual Property (IP) Audit and a discounted membership with the Institute of Directors is part of the coaching offer. Several of these companies have already taken advantage of the IP Audit (worth £3,000) and the Leadership & Management support.<br><br>Growth Accelerator works alongside other business support providers including UK Trade & Investment (UKTI) and the Manufacturing Advisory Service (MAS). If the business is not looking to achieve high growth then Growth Accelerator programme cannot support them. In those cases, the service looks to refer them to other providers who may be able to help them. | | | | | | | |
| **5. Peninsula Innovations Ltd (PIL)** | √ | √ | √ | √ | √ | √ | | √ |
| **Notes/Limitations to Service** | Service only available to high growth potential companies through the Innovation Centre, ExIST, or to University student entrepreneurs | | | | | | | |
| **6. PRIME** | √ | √ | | | | | | |
| **Notes/Limitations to Service** | Support for people aged 50 years and over. From January to December 2012 they have assisted 36 people in the Exeter area with pre start up support. Whilst they do not have data available on local start-ups, according to one of their recent business surveys, some 46% of people who receive support go on to start their own business. Currently, support is principally provided via on-line information on PRIME's website if they are eligible for support and have registered – see www.prime.org.uk.<br><br>PRIME is about to roll out an accredited qualification training programme 'preparing to run your own business' which supports individuals in researching their business idea. Those who complete are then matched with a mentor to support them through the early stages of their business set up. All of PRIME's services are fully funded therefore and free at the point of service to eligible beneficiaries. | | | | | | | |
| **7. Princes Trust** | √ | √ | | | | | | |
| **Notes/Limitations to Service** | **For 18-30 year olds;** Only one twelve-week course scheduled in Exeter in January in first 6 months of 2013; there are no pre-start courses currently scheduled for 2013 | | | | | | | |
| **8. West Devon BIP** | √ | √ | √ | √ | √ | | | |
| **Notes/Limitations to Service** | New Enterprise Allowance (NEA) scheme is now open to anyone signing on for JSA from day one; this includes the financial support to start up) the contract runs until end 2013; West Devon BIP who are contracted by Job Centre Plus has managed 28 NEA clients (May 2011 to March 2012), 9 have started business. From April 2012 until December 2012, they have managed 21 NEA clients, 5 are currently trading. West Devon BIP needs help in raising awareness of the need to secure a bank of mentors in Devon and Cornwall. They currently have 121 | | | | | | | |

| Provision of business support in Exeter – type of enterprise assisted | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Provider** | **Pre- Start** | **Start-up** | **Existing** | **Technology** | **Hi Growth** | **Social Enterprise** | **Co-ops** | **Social Business/ Entrepreneurs** |
| | active mentors, but need many more in light of a profiled increase in number requiring support).<br><br>**Support duration:** mentor support for NEA clients while they complete their business plan and ongoing mentor support once trading for a further 6 months. Thereafter, no support is free.<br><br>Fees are charged post 6 month mentoring support for NEA clients; Advice 6 x 1hr sessions £400; Business Planning course 5 days @ £2,500 | | | | | | | |
| **9. Women's Development Unlimited** | √ | √ | √ | | | √ | √ | √ |
| **Notes/Limitations to Service** | Range of courses of personal development / business coaching for women. The only funding they have to deliver services in Exeter is "Fast Track for Growth". The programme began in January 2012 and finishes in March 2013. Out of 56 existing businesses supported, 9 are based in the city. Two levels of service for existing businesses:<br>- a semi-intensive programme - two training seminars, 3 hrs coaching or 2 hrs mentoring, & a diagnostic for £50 - worth £350<br>- an intensive programme - 7 x 1/2 days action learning sets, 3hrs coaching 2hrs mentoring, 2 training sessions for £150, value £875.<br><br>Other fees based services to help start ups are: 2 hr training seminars @ £30, full day @ £75 and a coaching service.<br>The Coaching service programme includes: 1 x 1 hr Diagnostic & Develop Planning Session. 5 x 1 hr Business Coaching Sessions, Ongoing support via email; Access to a menu of personal development learning materials; Cross referral to additional sources of business support, development and mentoring. Cost of Package: £295 or £245 for previous Fast Track for Growth clients<br><br>6 businesses have been helped to start up, of which one was a social enterprise (data is awaited to confirm how many of these start-ups are based in Exeter). | | | | | | | |

| Provision of business support in Exeter – type of services provided in Exeter | | | | | | |
|---|---|---|---|---|---|---|
| **Provider / Service** | **Diagnostic** | **Business Planning** | **Financial Planning** | **1-2-1 service** | **Workshops/course** | **Mentoring** |
| **BAS** | | √ | √ | √ | | |
| **Business West** | | | | √ | √ | |
| **Exeter Business Support** | √ | √ | √ | √ | √ | |
| **Growth Accelerator** | | | | √ | | |
| **PIL** | √ | √ | √ | √ | √ | √ |
| **PRIME** | | | | | | |
| **Princes Trust** | | | | | √ | √ |
| **West Devon BIP** | | √ | | √ | √ | √ |
| **Women's Development Unlimited** | | | | | √ | √ |

**APPENDIX 2**

Examples of the types of traditional businesses and social enterprises assisted by City Council funded services

| ***Traditional businesses*** | | | |
|---|---|---|---|
| **Sector** | **Forecast turnover year 1** | **Sector** | **Forecast turnover year 1** |
| AGA Engineer | 30,000 | Nutritional Consultant | 15,000 |
| Artist | 15,000 | Online Retailing. | 12,000 |
| Bespoke Rugby and Social Wear | 30,000 | Outdoor Events | 30,000 |
| Builder Property Developer | 25,000 | Photographer | 20,000 |
| Buying and Selling Used Furniture | 10,000 | Proof Reading/Editing and Admin Services | 18,000 |
| Cleaning Services | 10,000 | Property Maintenance | 20,000 |
| Consultancy | 35,000 | Recycled clothing and Fashion | 10,000 |
| Counselling for Autistic Children | 20,000 | Singer Songwriter/Tutor. | 10,000 |
| Counsellor | 8,000 | Street Food Vendor | 25,000 |
| Creative Arts | 12,000 | Therapist | 8,000 |
| Estate Agency | 30,000 | Window and House Maintenance | 25,000 |
| IT Support and Services | 20,000 | | |

| Social Enterprises | | |
|---|---|---|
| **Sector** | **Description** | **Forecast turnover year 1** |
| Arts | Theatre company linking research work with theatre in the community to engender social cohesion | 15,000 |
| Arts | Participatory photography that provides empowerment, confidence and skills to disadvantaged groups | 10,000 |
| BME | Providing BME services in the Community e.g. English tuition; secured funding of £250k | 100,000 |
| BME | Resource centre for ethnic minorities offering services such as health and well-being, mentoring and counselling | 141,000 |
| Education | A multi cultural and intergenerational community arts, culture and environmental enterprise providing education activities | 30,000 |
| Health and Social Care | Services that aid memory for dementia sufferers | 94,000 |
| Training | Workforce skills development focusing on women including BME communities | 25,000 |
| Training and support | Providing services in the South West for women to enhance confidence, skills and knowledge in developing businesses | 50,000 |
| Training and support | Online retailing of own branded and third party goods; emphasis on providing employment and skills for people with learning disabilities | 30,000 |
| Transport | Bikes for disabled people aiming to improve health and well-being | 25,000 |

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**EXETER CITY COUNCIL**

**SCRUTINY COMMITTEE – ECONOMY**
**17 JANUARY 2013**

**UPDATE ON PROGRESS: REDUCING UNEMPLOYMENT IN EXETER**

## 1.0 PURPOSE OF REPORT

1.1 To update Members on progress to reduce the level of unemployment within Exeter.

## 2.0 BACKGROUND

2.1 In September 2012 this Committee received a report on trends in unemployment within Exeter as measured by those claiming Job Seekers Allowance (JSA) and also the nature of support available to help people into work.

2.2 In summary the report highlighted that:

- JSA claims had continued a downward trend
- claim rates remained higher for men
- fewer young people were claiming JSA for 6 to 12 months, but the number claiming over 12 months had increased
- the Council aimed to recruit 6 apprentices
- work with local employers had encouraged some to take on apprentices
- the City Development Unit was looking to strengthen its role in securing skills and employment for local people arising from proposed developments

## 3.0 UNEMPLOYMENT

3.1 Figure 1 illustrates JSA claimant rates as a percentage of the working age population for the South West. In November 2012, Exeter's rate stood at 2.4%, a decrease from August's rate of 2.5%, a reduction of 135 claimants.

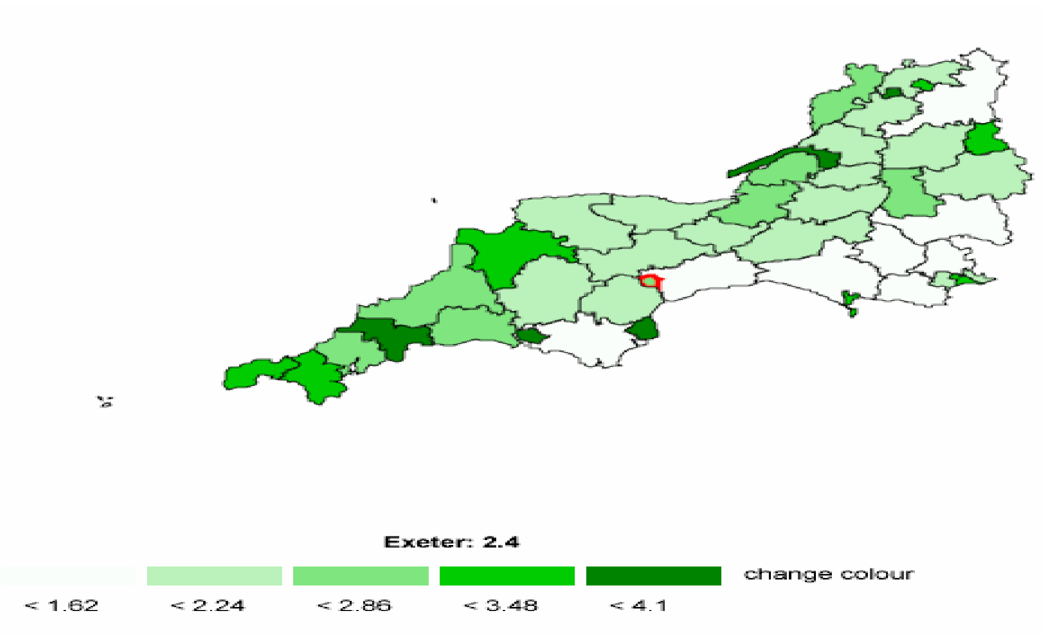


**Figure 1 – JSA Claimant Rates for the South West – November 2012**

3.2 Table 1 below highlights the change since August 2012 in JSA claims over the past 3 months of available data. The results illustrate the following:

- The total number of JSA claims has continued a downward trend
- Claim rates remain higher for men
- Fewer young people are claiming JSA for 6 to 12 months. The number of young people claiming for 12 months plus has stayed the same

**Table 1: Exeter JSA Claimant Data for 16-64 year olds from August – November 2012 (compared with Plymouth, South West and England and Wales for November only)**

| | Aug | Sept | Oct | Nov | Plymouth | SW | E & W |
|---|---|---|---|---|---|---|---|
| *[1] Total no. of JSA Claimants | 2,085 (2.5) | 2,005 (2.4) | 1,990 (2.4) | 1,955 (2.4) | 6,130 (3.7) | 84,910 (2.6) | 1,334,875 (3.7) |
| No. of Males | 1,395 (3.3) | 1,345 (3.2) | 1,330 (3.2) | 1,305 (3.1) | 4,140 (4.7) | 55,875 (3.4) | 861,115 (4.8) |
| No. of Females | 690 (1.7) | 660 (1.6) | 660 (1.6) | 650 (1.6) | 1,990 (2.3) | 29,035 (1.8) | 473,760 (2.7) |
| No. 16 – 24 years | 610 | 610 | 570 | 575 | 2,045 | 24,480 | 369,370 |
| No. 25 – 49 years | 1,125 | 1,085 | 1,100 | 1,065 | 3,285 | 45,525 | 748,500 |
| No. 50+ years | 345 | 315 | 320 | 310 | 800 | 14,905 | 217,005 |
| *[2] Claiming 6 to 12 months | 360 (105) | 320 (90) | 305 (75) | 275 (70) | 945 (320) | 12,390 (3,065) | 207,105 (50,445) |
| *[2] Claiming 12 months + | 530 (115) | 520 (115) | 510 (115) | 490 (115) | 1,685 (440) | 20,305 (4,215) | 371,920 (68,920) |

*[1] Figures in brackets indicate the rate of JSA claimants as a percentage of the working age population; *[2] Figures in brackets represent the number of young people aged 16-24 years claiming JSA

## 4.0 PROGRESS

4.1 Progress on activities raised in the September 2012 report to this Committee is set out below under each of the recommendations made.

**Apprenticeships**

4.2 Recommendation – *develop a Council apprenticeship employment strategy, and explore the financial viability of employing up to 10 young people as apprentices within the Council.*

**Progress made –** The Council has recruited 5 apprentices out of the 6 targeted for this year. Two of those recruited are in administrative positions, two are in Parks and Gardens and the fifth is a Culture and Heritage apprentice, placed in the Museum. An additional vacancy within the Museum is still available. There is now a waiting list of other departments interested in taking on an apprentice, although the target for 2013 has not yet been set.

4.3 Recommendations -

- *work to influence local major employers to establish a recruitment programme that employs collectively upto 100 new apprentices suited to business needs*
- *work to influence local major employers to provide work placements for at least 300 Exeter resident job seekers*

**Progress made –** the Council has built on the foundations of the existing, Employment and Skills Board led "Get Devon Working" campaign, which started in March 2012, dedicating officer time to generating new referrals.

Since 1 June 2012, on behalf of the Board, officers have contacted 125 local employers to discuss skills and recruitment pathways. The combined efforts of the City Council officers and partners has resulted in a total of:

- 15 additional apprenticeship positions being created
- 10 larger employers referred to the National Apprenticeship Scheme (NAS)
- 5 employers referred to the University for Graduate/Student internships; of which 4 have so far joined the scheme offering vacancies
- 2 work experience placements

Overall the "Get Devon Working" campaign has raised awareness through a series of articles placed in the Express and Echo and through promotion on the Council's website – www.exeter.gov.uk/getdevonworking .

Of the 125 employers contacted 28% had already taken on apprenticeships in the previous 12 months creating 116 apprenticeship places; 9% had offered work placements providing 70 work experience opportunities and 10% had employed graduates on a placement creating 124 internships between them.

In addition, the labour market intelligence obtained via contact with employers revealed:

- information about skills issues and hard to fill vacancies; this information will be used by the Employment and Skills Board to influence local training provision
- that many employers felt "they were too small to take on an apprentice;" this view was held despite businesses half their size having been active employers of apprentices
- the majority of businesses in the legal and accountancy sector do not appear to employ apprentices. This appears to be based on the view that "school leavers would not have the necessary skills and new staff progress through the usual professional qualifications route". However, employment in larger firms will also include IT and administration, for which apprenticeship routes are available.

***Recommended***: the Council continue to work with the Employment and Skills Board and the local partners within the Get Devon Working Campaign to:

- encourage small businesses to take on apprentices, showcasing local examples and also raise awareness of alternative recruitment methods, e.g. the Apprenticeship Training Association (ATA) model which enables businesses to share an apprentice

- promote the grants available to businesses to employ apprentices
- to encourage apprenticeships within the local professional sector by working with NAS and the Chamber of Commerce to promote the wide range of apprenticeships available.

4.4 Recommendation – *explore with the Employment & Skills Board and NAS how small local charities may be enabled to employ local people on apprenticeships*

**Progress made –** NAS completed their research across the South West to examine good practice in the support required to assist local employers within the voluntary and social enterprise sectors to take on apprentices. They have been in contact with Exeter CVS and Exeter CAB, and the Fruit Tree for Business (representing social enterprise interests) to take this project forward via a small working group.

***Recommended*****:** officers monitor progress with NAS and provide support as required.

**Planning Process**

4.5 Recommendations –

- *within the Council, develop an approach that aims 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*
- *develop a policy with NAS that secures increases in employment, skills development, and apprenticeships arising from the procurement of major projects through the Council's approval of planning developments*

**Progress made** – collaboration between the City Development Unit and the Economic Development Service and the Employment and Skills Board continues to explore practical options to secure employment and workforce skill development outcomes through the planning processes. Recent progress in shaping the planning process has been made in the following areas:

- a jobs and skills analysis produced in 2010 for Exeter and Heart of Devon area is currently being updated. This will form part of the evidence base to support new planning policies, such as the new "Access to Jobs" policy within the Site Allocations & Development Management Plan (currently entering its second round of consultation, anticipated for adoption in early 2014 subject to a timeline for evidence submission which is currently being drafted by the City Development Unit)

- the City Development Unit's on-going system's review is re-visiting the approach to be used in relation to requirements for planning applications. Officers will report back on progress made. In the meantime, the Employment and Skills Board Project Coordinator is meeting City Development officers in January to agree an approach regarding access to developers at the pre-application discussion stage. The aim is to discuss employment and training opportunities and how their development could help assist in addressing unemployment and skills shortages

- there is a considerable amount of housing and commercial development within Exeter and the wider economy which provides many jobs and potentially even more opportunities for local people and businesses. The Employment and Skills Board have secured from Jobcentre Plus the provision of 2 full-time staff (December 2012 for two years) who will be based within the Economy Unit. They will establish a centrally coordinated focal point for skills and training activity associated with developments. Work will include working with developers and gaining their commitment to, and supporting delivery of, employment and skills strategies and brokering for local people skills training, apprenticeships and full-time jobs.

***Recommended***: officers work with the Employment and Skills Board to ensure the planning process effectively works towards the creation of opportunities to influence the employment and skills opportunities for local people.

**Work Experience**

4.6 Recommendation – *seek to establish a work placement strategy for up to 25 job seekers within the Council*

**Progress made –** discussions with staff within Human Resources (HR) indicate that the Council provides around 30 work placements opportunities each year. These are taken up by school pupils and unemployed people seeking employment; since April 2012, some 11 people have been on Council work placements

***Recommended***: officers work with HR staff to review how the process of creating work placements within the Council could be replicated as a model that could be rolled out for adoption by local employers in the city.

**Supporting Volunteering**

4.7 Active participation in voluntary work provides opportunities for unemployed people to maintain and/or grow their confidence, to sharpen their current skills and learn new ones – all of which can enhance their employability.

Recommendation – *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*

**Progress made –** Exeter CVS continue to provide "introduction to volunteering" sessions in parts of the city and also deliver from time to time employability courses to people referred to them by Job Centre Plus.

*Recommended*: officers monitor progress on volunteering activity via Exeter CVS and provide support, as required, if promotion of volunteering (subject to available opportunities) needs to be extended into other wards that are particularly affected by unemployment.

**Work Clubs**

4.8 Recommendation – *explore with Forward 25 Careers and other providers of work clubs how unemployed people can be supported on projects enabling them to go onto further training, apprenticeships, employment or self-employment*

**Progress made –** Forward 25:

- have met with Westward Pathfinder, the outcome of which has resulted in the latter being able to offer skills training via NVQ qualifications for people participating in work placements created by Forward 25
- have completed a successful trial where work placement individuals received one to one mentoring during their 8 week project. Consequently they have been in discussions with Job Centre Plus to roll out the offer on a wider scale. In addition they have applied for funding to deliver an initial 16 week programme with Job Centre clients running from January that aims to support 32 work placement individuals
- will draw on Westward Pathfinder's offer of NVQ training if an individual has learning needs
- are working with higher education contacts aiming to undertake research in January with clients of Job Centre Plus to assess barriers to youth employment in Exeter; the results should be published in March and may include a break down of results to ward level.

***Recommended that:***

- officers maintain contact with Forward 25 and Westward Pathfinder to monitor progress and provide support, if required, to encourage joint working with other work clubs if appropriate
- when the research into youth employment by Forward 25 becomes available, officers to work with the Employment and Skills Board, review results and assess if the Council should encourage bespoke projects to reduce youth unemployment in Exeter

**Raising Awareness**

4.9 Recommendation – *work with partners to facilitate support and stimulate awareness [*of support available to recruit unemployed people*] which addresses gaps in helping people into work*

- In November 2012, the Department for Work and Pensions published the performance of the Work Programme which is designed to help people back into work. People supported in the work programme include claimants who are under 24 years of age, those with multiple disadvantages, ex-offenders, homelessness, people not in education or employment, people who are disabled.
- The providers in Exeter are Working Links and Prospects. They have been working with 1,120 unemployed people in the city since the programme's national launch in 2011.
- Media coverage has stated that to date, only 40 had stayed in employment for six months or more, a 3.6 per cent success rate. The Government's target is 5.5 per cent.

**Progress made –**

- Officers have contacted the two providers in Exeter. A response has been received from Working Links. They have indicated their performance data for Exeter secured a rate of 5.36%, marginally below the Government's target for individuals employed for 6 months or more.

- Barriers to employment in Exeter for individuals on the Work Programme include a continual lack of awareness amongst employers of the services and incentives available to employ them. These include for example, wage incentives which form part of the Government's Youth Contract initiative and work experience support for 18-24 year olds and people returning to the labour market following health problems.

***Recommended*****:** officers look to develop an effective approach with the Work Programme providers raising awareness interest from local employers with a view to securing an increase in the 6 month + employment rate for local individuals.

- officers have worked with Exeter CVS's 'Business for Exeter Communities Group' (BECG) and planned and participated in their all day workshop held in October last year for 12 young unemployed people. The young people were guided on job hunting and interview techniques; subsequently 2 of them secured employment. BECG have indicated they may run a similar event in the Spring of 2013.

***Recommended*****:** subject to staff availability, officers continue to provide adhoc support to BECG's initiatives as requested.

- to help stimulate awareness of the support available to recruit unemployed people, a leaflet summarising the support for employers to take on apprentices, work placements and graduate internships was produced and distributed by email to Exeter Chamber of Commerce and Industry (now promoted on their website) and the local Federation of Small Businesses (FSB); the leaflet is also displayed on the Employment and Skills webpage hosted within the City Council's website

***Recommended*****:** officers to continue to promote employment support and recruitment opportunities for local employers via city business networks.

- Officers explore with the County Council a proposal that arose, namely 'Project Search' – an American model for helping young people with a learning disability get into work. The County Council has funding to establish 3 Project Search sites in Devon, one being within Exeter. There is a need to secure an employer in the city able to offer a range of internship situations.

**Progress made –**

- The County Council have been working with Exeter College and Pluss (a Devon organisation which offers employment, development, and training opportunities for people who have disabilities) and have been in discussions with RD&E Wonford.
- The project intends to secure 8 to 10 long-term internships for people with learning disabilities. However, it is unlikely to be ready for launch until September 2013.
- The interns will gain experience of work across a range of hospital departments. The type of outcomes anticipated from Project Search will be paid employment for some individuals within the hospital and for all to be better prepared for work with improved employability skills.

***Recommended*:** officers maintain contact with the County Council as the Project Search activity proceeds in Exeter and provide support as necessary to assist in promoting internships for local people with learning disabilities in the city.

4.10 Finally, Members may be interested in the wider activities undertaken by the Employment and Skills Board which supports the Council's ambitions to reduce unemployment (directly and indirectly) in the city. In this context, the Board has:

- established a not-for-profit company, led by the employers as Directors – this will become the delivery arm for the Employment and Skills Board (ESB) and be used as a vehicle to compete for and facilitate consortium funding bids
- launched a new award for young people (16-19 years old) – the award aims to develop core "employability" skills and better prepare individuals to meet the needs of the labour market. The Award will run as a pilot from January and involve – the four colleges within Exeter and the Heart of Devon, 100 students and include the support of 20 business mentors
- worked with E.ON. to coordinate an energy-themed training programme to up-skill unemployed residents. To date, 55 unemployed individuals have received free training and 5 have progressed to achieve a City & Guilds qualification
- 6 sector-focused case studies have been disseminated and accessed by hundreds of employers – the aim is to increase the take-up of apprenticeships and increase opportunities for local job seekers
- to date produced 20 "Skills Maps" for a range of employment sectors. The maps help employers identify and address the skills needs and gaps in their workforce. In addition, they help young people understand the type and level of skills employers look for. Training providers and NAS now use the maps which were designed by the Board across Southern England to engage and educate thousands of employers and learners about workforce skills.

**5.0 FINANCIAL IMPLICATIONS**

5.1 There are no financial implications arising from this report other than staff time.

**6.0 RECOMMENDATION** that:

6.1 Members comment on progress made.

6.2 Officers pursue activity outlined in section 4.0 and report back on progress to future meetings of this Committee.

**RICHARD BALL**
**ASSISTANT DIRECTOR ECONOMY**

**Local Government (Access to Information) Act 1985 (as amended)**
***Background papers used in compiling this report:***
'Unemployment in Exeter' (31 May 2012) and 'Progress Report: Unemployment in Exeter,(6 September 2012) reports to the Scrutiny Committee – Economy, Exeter City Council