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 5 SEPTEMBER 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, Democratic Services Officer (Committees) 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 30 May 2013.

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**

RESOLVED that, under Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting during consideration of item 16 on the grounds that it involves the likely disclosure of exempt information as defined in paragraph 3 of Part I, Schedule 12A of the Act.

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

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

Details of questions should be notified to the Corporate Manager Democratic and Civic Support at least three working days prior to the meeting. Further information and also a copy of the procedure are available from Democratic Services (01392 265107) also on the Council web site.
http://www.exeter.gov.uk/scrutinyquestions

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

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

7 **PRESENTATION: KNOWLEDGE ECONOMY CONSULTATION UPDATE**

To consider the report of the Economy and Tourism Manager - *report circulated* 5 - 8

Members will receive a presentation from the appointed consultants Mickeldore.

PERFORMANCE MONITORING

8 **BUDGET MONITORING (QUARTER 1)**

To consider the report of the Acting Assistant Director Finance – *report circulated* 9 - 20

MATTER FOR CONSIDERATION BY THE EXECUTIVE

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

To consider the joint report of the Assistant Director Economy and City Centre Manager - *report circulated* 21 - 52

MATTERS FOR CONSIDERATION BY SCRUTINY COMMITTEE - ECONOMY

10 **PETITION - MAGDALEN ROAD CAR PARK CHARGES**

To consider the report of the Assistant Director Public Realm - *report circulated* 53 - 54

11 **TRANSPORT INITIATIVES AND ISSUES - UPDATE**

To consider the report of the Projects and Business Manager - *report circulated* 55 - 66

12 **EXETER COMMERCIAL PROPERTY REGISTER**

To consider the joint report of the Economy and Tourism Manager and Senior Economy and Tourism Officer - *report circulated* 67 - 72

13 **RAMM VISITOR RESEARCH 2013/14**

To consider the report of the Museums Manager – *report circulated* 73 - 76

14 **WORK SCHEDULE PROGRAMME MEETING**

Work Schedule Programme Meeting 25 July 2013 – to note and consider matters arising in relation to Scrutiny Committee – Economy – *notes attached* 77 - 78

15 **PARKWOOD LEISURE WORKING GROUP - MEMBERSHIP**

Due to the change in the Portfolio Holder responsibility from Environment and Leisure to Economy and Culture, nominations are sought from Members of the Scrutiny Committee – Economy for the Parkwood Leisure Working Group. 79 - 80

A copy of the Terms of Reference is attached. Forthcoming scheduled meetings are to be held on 9 September and 25 November 2013.

PART 11: ITEM SUGGESTED FOR DISCUSSION WITH THE PRESS AND PUBLIC EXCLUDED

MATTER FOR EXECUTIVE

16 **MINUTES OF EXETER AND HEART OF DEVON GROWTH BOARD - 8 JULY 2013**

To receive the minutes of the meeting held on 8 July 2013 – *report circulated to Members* 81 - 88

DATE OF NEXT MEETING

The next **Scrutiny Committee - Economy** will be held on Thursday 14 November 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 Leadbetter (Chair), Brock (Deputy Chair), Bialyk, Bowkett, Branston, Bull, Crew, Crow, Mottram, Pearson, Prowse, Robson and Wardle

Find out more about Exeter City Council services by looking at our web site *http://www.exeter.gov.uk.* This will give you the dates of all future Committee meetings and tell you how you can ask a question at a Scrutiny Committee meeting. Alternatively, contact the Democratic Services Officer (Committees) on (01392) 265115 for further information.

Individual reports on this agenda can be produced in large print on request to Democratic Services on 01392 265111.

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY

5 SEPTEMBER 2013

KNOWLEDGE ECONOMY CONSULTATION UPDATE

1. PURPOSE OF REPORT

1.1 To update members on work undertaken on the preparation and development of a knowledge based economic development strategy for Exeter. Members will receive a presentation from the appointed consultants and views are invited on the direction and progress of the development of the strategy to date.

2. BACKGROUND

2.1 Scrutiny Committee – Economy (7 March 2013) and Executive (19 March 2013) approved funding to appoint a consultant to provide specialist advice to the City Council, and to key partners, on the potential opportunities to grow the city's knowledge economy further as a focus for attracting investment and renowned expertise, growing businesses, developing new sources of business activity for local companies, and creating employment opportunities for local people.

2.2 The development of the knowledge economy has been an ongoing priority for some time for the City Council and its existing Economic Development Strategy, and in its partnership working with its neighbours, East Devon District Council, Devon County Council, the University of Exeter, Peninsula College of Medicine and Dentistry, Exeter College, the Met Office and others. The current ongoing economic difficulties and the uncertain future facing different sectors in the city have led to a realisation that the city has to embrace the need for managed change in its economy, and that it has had to deliver the infrastructure needed to support and facilitate economic growth.

2.3 Against a background of low average income levels and economic restructure, supporting the growth of high value added jobs is essential for the future economic success of the city.

2.4 The city's economy has proved resilient throughout the economic downturn but there is no room for complacency. The creation of high value added employment opportunities, attracting and retaining high skilled workers, and capitalising on existing strengths and assets (such as the University of Exeter) are especially important as the city continues to strengthen its economy.

2.5 Recent developments and the achievements of key organisations in the city have created what might be regarded as a platform for facing up to the key challenges to growing the city's knowledge economy. It is intended that the strategy will build upon the opportunities arising out of:

- Exeter's position as a principal economic driver and its relationship with the wider 'real' economic geography of the city, including its economic relationships with East Devon, Mid Devon and Teignbridge
- rationalising and promoting the city as a prime location for investment and relocation
- the important strategic developments including the Exeter Science Park, Skypark Business Park, and existing developments, organisations and

networks such as the Innovation Centre, the Met Office and the ‘Exist’ initiative by the Chamber of Commerce

- the research and development strengths of the University of Exeter, recently acclaimed as University of the Year with its developing world class research environment with positive engagement and knowledge transfer between users of research in industry, government and the third sector
- the above national average level of employment in the knowledge economy in the area and the above average skills levels
- the high quality of life in the city and surrounding area

3. TENDER PROCESS

3.1 A tender for the work was sent to five specialist companies with experience in the knowledge economy and of developing strategies for cities with similar characteristics to Exeter. Three responded with formal proposals.

3.2 Of the three submissions received for the work the one received from Mickledore demonstrated the most relevant experience, expertise and recognised the key requirement to produce a very practical strategy which has a clear set of actions, each owned by an individual/organisation and with a specified outcome for the action concerned within an agreed timetable.

3.3 Mickledore have set out their approach against 6 interlinked stages, to develop and deliver the strategy on time and on budget for October 2013.

Stage 1 – Capacity and Capability
To understand the current state of the knowledge economy in the area both from the perspective of knowledge based institutions and in terms of sector strengths and key companies.

Stage 2 – Opportunities, strengths and barriers
To determine the opportunities for the knowledge economy and any factors that are preventing these opportunities being fully realised.

Stage 3 – Review of support mechanisms
To map the business support mechanisms that are in place, understand their target companies, the resources in place and the breadth of the offer.

Stage 4 – Skills and education requirements
To determine the gaps between opportunities and skills and education.

Stag 5 – Action plan
To create a single set of actions that can best coordinate the role of all the stakeholders and has the buy-in of all the interested parties.

Stage 6 – Resources
To establish the resources required to achieve the action plan.

3.4 A project steering group of knowledge economy businesses has been established to question and monitor the work and research undertaken by Mickledore to ensure that the resulting strategy and action plan is pragmatic, deliverable and relevant to the city's economy.

3.5 The final strategy will be brought back for approval by the City Council in November.

4. RESOURCE IMPLICATIONS

4.1 The cost of this piece of work will be no more than £20,000, funded from the New Homes Bonus receipts.

5. RECOMMENDATION

5.1 Members to receive a presentation from Mickledore and to comment on the direction and progress of development of the strategy to date.

Victoria Hatfield
Economy and Tourism Manager

Local Government (Access to Information) Act 1985 (as amended)
Background papers in compiling this report:-

Preparation of Knowledge Economy Strategy 2013 – 2018
Scrutiny Committee – Economy
7 March 2013

Executive
19 March 2013

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE - ECONOMY
5 SEPTEMBER 2013

BUDGET MONITORING REPORT TO 30 JUNE 2013

1. PURPOSE OF REPORT

1.1 REVENUE BUDGET MONITORING

This report advises Members of any material differences by management unit to the revised budget.

1.2 CAPITAL BUDGET MONITORING

Budget monitoring updates in respect of the Economy and Development Capital Programme are incorporated into this report, which is prepared on a quarterly basis, in order to improve financial reporting to this Committee and help to provide a more comprehensive financial update in respect of the Scrutiny Committee – Economy budgets.

1.3 AREAS OF BUDGETARY RISK

Potential areas of budgetary risk are also highlighted in this report, so that Members are aware that certain budgets have been identified as being vulnerable to factors beyond the control of the Council, which may result in potential deviations from budget, and are therefore subject to close monitoring, by officers.

2. REVENUE BUDGET MONITORING TO 30 JUNE 2013

2.1 The current forecast suggests that net expenditure for this committee will increase from the revised budget by a total of £83,250 after a transfer from a reserve and a revenue contribution to capital, as detailed in Appendix 1. This represents a variation of 2.08% from the revised budget. This includes supplementary budgets of £273,610. Capital charges have been deducted from this to provide the total budget for management accounting purposes.

2.2 The current forecast variance represents an increase in expenditure of £68,250. The significant variances are:

MU Code	Management Unit	Over / (Underspend)	Detail
83A1	Property & Estates Services	(69,400)	• Additional income from property portfolio - High Street & Sidwell Street
83A4	Economic Development	25,060	• Additional salary costs - PA to Assistant Director offset by saving in Resources committee • Christmas Lights core budget - approved by Executive

MU Code	Management Unit	Over / (Underspend)	Detail
83B5	Planning Services	127,850	• Planning fee income – projected to be significantly less than budget for year • Salary savings – saving on salary budget due to non recruitment to a number of vacant posts • Revenue contribution – Contribution to Cowick Street Environmental works capital scheme.
83B9	Markets & Halls	(22,930)	• Additional income – Corn Exchange and Livestock Centre income expected to exceed budget. • Additional Expenditure – Event promotion at Corn Exchange (offset by additional income) and additional expenditure on food and drink at venue.

2.3 The main variations by management unit are detailed below:

		£
2013-14	**REVISED ESTIMATE Less NOTIONAL CHARGES**	(4,002,350)

83A1 PROPERTY & ESTATES SERVICES (69,400)

The majority of the income budgets in respect of the property portfolio are on profile as at 30 June.

The income budgets in respect of commercial properties are expected to exceed the annual budget with additional income anticipated from commercial properties in the High Street and Sidwell Street.

83A3 CAR PARKING 0

National Non-Domestic Rates (NNDR) and maintenance costs are expected to exceed the budget. It is expected that these costs will be offset by additional income from recharges to an external body and income from Penalty Charge Notices (PCN's) in excess of the budget.

83A4 ECONOMIC DEVELOPMENT 25,060

The transfer of a member of staff to this area will result in pay budgets being exceeded. The additional cost will be offset by a saving on pay budgets in the Scrutiny Resources Committee.

Executive approved a budget for Christmas Lights which was recommended by the Christmas Lights Task and Finish Group. The costs incurred will be reported as additional in year expenditure.

83A5	**ARTS & EVENTS**	0

There is no variance projected in this management unit as the additional expenditure incurred will be offset by the grant income received as detailed below.

Grant funding has been received from the Arts Council and Exeter Canal and Quay Trust. The grant income will be used to part fund the Unexpected Festival and Summer Sundays on the Quay.

83A6	**TOURIST INFORMATION**	3,170

It is projected that there will be a small shortfall of income in respect of the Visitor Information Centre.

The projection is based on quarter 1 figures, if income streams exceed the profiled budget in subsequent quarter's income targets will be met and may exceed the target for the year.

83A8	**DISTRICT HIGHWAYS & FOOTPATHS**	0

No material variances are anticipated.

83A9	**BUILDING CONTROL**	(5,000)

The Building Control fee earning account is budgeted on a cost recovery basis. The income from building control fees was above profile as at 30 June 2013. As it is early in the financial year and fee income can vary significantly on a monthly basis a surplus on the account is not being projected at this stage.

However, if fee income continues to exceed the budget profile a surplus should be made on the fee earning account at year end.

The fees charged for Land Charges are also calculated on a cost recovery basis, the service is expected to breakeven on a 3 year rolling cycle. The service failed to breakeven in the previous 2 financial years as a result search fees were increased with effect from 1 May 2013.

Figures as at 30 June show that income from search fees are above the profiled budget for the period. Therefore it is anticipated that the deficit for the previous 2 financial years will be recovered.

83B1	**LAND DRAINAGE AND WATER COURSES**	

No material variances are anticipated.

83B5	**PLANNING SERVICES**	127,850

Income from planning fees was significantly less than the profiled budget as at 30 June 2013. It is therefore anticipated that income received in year will be less than the annual budget.

The anticipated shortfall of income will be offset by savings on employment budgets due to non recruitment to a number of vacant posts.

A revenue contribution will be made to the Cowick Street Environmental Works capital scheme.

83B9	**MARKETS & HALLS**	(22,930)

The budget in respect of event promotion at the Corn Exchange will be exceeded. This additional expenditure will be covered by the additional income received in respect of the events held at the venue.

Income figures are above the profiled budget as at 30 June with income at the Corn Exchange being above the profile. It is anticipated that this will continue meaning income received from the facility will exceed the budgeted figure at year end.

Sources of income that are anticipated to be above the budgeted figure are income from events at the Corn Exchange and from car boot sales, boardroom hire and car parks at the Matford Centre.

83C1	**WATERWAYS**	9,500

Additional expenditure has arisen on maintenance of a boat and the locks, and a backdated rent increase has also increased costs.

Consultants' fees have arisen but these will be funded from an earmarked reserve.

2012-13 EXPECTED FINAL OUTTURN	**(3,934,100)**
REVENUE CONTRIBUTION TO CAPITAL	**20,000**
TRANSFER FROM RESERVES	**(5,000)**
EXPECTED TOTAL NET EXPENDITURE	**(3,919,100)**

3. CAPITAL BUDGET MONITORING TO 30 JUNE 2013

To report the current position in respect of the Economy Capital Programme and to update Members with any anticipated cost variances, acceleration of projects or slippage of schemes into future years.

3.1 REVISIONS TO THE ECONOMY AND DEVELOPMENT CAPITAL PROGRAMME

The 2013/14 Capital Programme, including commitments brought forward from 2012/13, was last reported to Scrutiny Committee – Resources on 19 June 2013. Since that meeting the following changes have been made that have increased the programme:

Description	£	Approval/Funding
Capital Programme, as at 19 June 2013	**2,455,820**	
National Cycle Network	71,940	Contributions from DCC
Environmental Improvements to Cowick Street	20,000	Revenue contribution to capital outlay
Well Oak Footpath/Cycleway	5,650	S106 contribution
Planting Improvements in Riverside Valley Park	590	S106 interest
Paris Street Roundabout	200	S106 interest
Heavitree Environmental Improvements	110	S106 interest
Revised Capital Programme	**2,554,310**	

3.2 **PERFORMANCE**

The current Economy Capital Programme is detailed in Appendix 2. The appendix shows a total forecast spend of £1,960,727 in 2013/14 with £476,150 of the programme expected to be deferred until 2014/15. The main variances, achievements and issues concerning expenditure in 2013/14, and schemes which may be deferred to 2014/15, are as follows:

Provide Great Things For Me To See Do and Visit

- **Canal Basin and Quayside (*Budget £426,150*)**

The budget will not be spent in its entirety this year since capital receipts need to be secured to deliver elements of the Delivery Strategy. The boardwalk around 60 Haven Road is currently under construction and it is planned to improve Haven Banks with some tree planting and benches as well as designing some public art boundary features for the main boat yard. Some of the more unsightly hulks will also be removed from the quaysides.

Improve the Environment and My Neighbourhood

- **Cowick Street Environmental Works (*Budget £167,480*)**

It is predicted that actual expenditure for this scheme will be in the region of £20,000 more than the original budget. It has been agreed to use a contribution from revenue to meet these additional costs. The proposals required a lot of bespoke and artist designed street furniture resulting in tailor-made manufacture and construction and consequently much higher costs than for catalogue items. The site conditions have also made the works more expensive: there are numerous below ground services in the footways many of which are not shown on utility companies drawings which add to the difficulty and cost of the excavation and installation works. The scheme is expected to complete by mid September.

- **Exhibition Way Bridge Maintenance (*Budget £45,000*)**

This scheme may slip into 2014/15; members will be updated when more information is available.

- **Northbrook Flood Alleviation Scheme (*Budget £200,000*)**

This scheme is subject to grant aid from DEFRA, this year their criteria have changed leading to this scheme not qualifying as a priority and as a result being deferred until 2014/15 or beyond. More information will become available as to where the scheme lies in the Environment Agencies 5 year plan in October.

- **Topsham Lock Leak (*Budget £35,000*)**

Works at Topsham Lock to seal the leak have been completed.

- **Replacement of Car Park Pay & Display Machines (*Budget £230,000*)**

The scheme involves the replacement of 67 machines across all of ECC's pay and display car parks. The current machines are worn and none are DDA compliant. We are currently at the invitation of interest prior to tenders stage and expecting the equipment to be installed shortly after Christmas.

- **Science Park (*Budget £675,990*)**

The Science Park Centre will provide over 30,000 square foot of space for businesses and programmes of support to help new businesses to start and grow and create new jobs. The Council's final contribution of £559,568 has now been paid producing a saving of £116,422 against the 2013/14 budget.

4. **AREAS OF BUDGETARY RISK**

4.1 The table below identifies a number of areas that have been identified as a budgetary risk within the Economy and Development revenue budgets. No variances are being projected on the risk areas at this stage with the exception of planning fee income (see 2.2 & 2.3).

4.2 The areas of risk are as follows:

Budget Title	Approved Budget	Risk
Property & Estates Services – Income budgets property portfolio	£3,500,610	Income dependant on properties let and the number of properties which are void for long periods of the year. Leases can be renegotiated at lower rate to ensure income streams are maximized but resulting in shortfall of income against budget. If properties are void there will be a loss of income and the council becomes liable for the Non Domestic Rates at the property. This could result in an overspend if void period is significant.

Budget Title	Approved Budget	Risk
Car Parks – fee income	£5,660,000	A significantly increased budget was set for 2013/14, which appears achievable based on the results for the first quarter. However, this source of income can be affected by factors outside the control of Exeter City Council and even a small shortfall in percentage terms could be significant because of the size of the budget. The income is closely monitored and updates are provided to Members and the Senior Management Team on a monthly basis.
Planning Services – planning fee income	£667,850	Fee income projected to be significantly lower than budgeted based on quarter 1 figures. Continual monitoring of income is being carried out by officers. An update on the projected shortfall will be provided to Members and the Senior Management Team on a monthly basis.

5. RECOMMENDED that

5.1 Scrutiny Committee – Economy note this report.

ACTING ASSISTANT DIRECTOR FINANCE

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

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APPENDIX 1

SCRUTINY COMMITTEE - ECONOMY
BUDGET MONITORING

APRIL 2013 TO JUNE 2013

ORIGINAL ANNUAL BUDGET	SUPPLEMENTARY BUDGETS	CAPITAL CHARGES	REVISED BUDGET EXC CAPITAL CHARGES	CODE		CURRENT OUTTURN FORECAST	FORECAST VARIANCE
£	£		£			£	£
(2,853,220)	30,000	0	(2,823,220)	83A1	PROPERTY & ESTATES SERVICES	(2,892,620)	(69,400)
50,000		0	50,000	83A2	TRANSPORTATION/CONCESSIONARY FARES	50,000	0
(3,876,170)		(129,510)	(4,005,680)	83A3	CAR PARKING	(4,005,680)	0
511,510	54,000	0	565,510	83A4	ECONOMIC DEVELOPMENT	590,570	25,060
194,740		0	194,740	83A5	ARTS & EVENTS	194,740	0
449,130		(3,190)	445,940	83A6	TOURIST INFORMATION	449,110	3,170
350,740		(156,620)	194,120	83A8	DISTRICT HIGHWAYS & FOOTPATHS	194,120	0
120,700		0	120,700	83A9	BUILDING CONTROL	115,700	(5,000)
159,190		(6,070)	153,120	83B1	LAND DRAINAGE	153,120	0
0		(150)	(150)	83B4	ENGINEERING & CONSTRUCTION SERVICES	(150)	0
713,790	80,000	(4,410)	789,380	83B5	PLANNING SERVICES	917,230	127,850
116,580	10,000	(5,850)	120,730	83B6	CONSERVATION	120,730	0
66,730		(4,870)	61,860	83B7	ARCHAEOLOGICAL FIELD UNIT	61,860	0
75,000	50,000	0	125,000	83B8	MAJOR PROJECTS	125,000	0
(283,810)	40,110	(17,030)	(260,730)	83B9	MARKETS & HALLS	(283,660)	(22,930)
295,370	9,500	(38,540)	266,330	83C1	WATERWAYS	275,830	9,500
0							
(3,909,720)	**273,610**	**(366,240)**	**(4,002,350)**		**NET EXPENDITURE**	**(3,934,100)**	**68,250**

VARIANCES ON TRANSFERS TO / (FROM) EARMARKED RESERVES	
83C1 - Waterways	(5,000)
83A4 - Economic Development	
83B1 - Land Drainage	
83B8 - Major Projects	
83B9 - Markets & Halls	
REVENUE CONTRIBUTION TO CAPITAL	
83B5 - Planning	20,000
OVERALL FORECAST EXPENDITURE FOR THE YEAR AFTER MOVEMENTS TO/FROM RESERVES	**(3,919,100)**
REVISED BUDGETS	**(4,002,350)**
ADJUSTED OUTTURN VARIANCE	**83,250**

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APPENDIX 2

2013/14
CAPITAL MONITORING TO 30 JUNE 2013

	2013/14 Capital Programme	2013/14 Spend to 30 June	2013/14 Forecast Spend	2013/14 Budget to be Carried Forward to 2014/15	2013/14 Programme Variances Under ()
	£	£	£	£	£
ECONOMY & DEVELOPMENT					
PROVIDE GREAT THINGS FOR ME TO SEE DO AND VISIT					
Canal Basin and Quayside	426,150	5,500	150,000	276,150	0
ACCESSIBLE CITY					
National Cycle Network	71,940	71,940	71,940		0
John Lewis Car Park Refurbishment	2,330	200	2,330		0
IMPROVE THE ENVIRONMENT AND MY NEIGHBOURHOOD					
Cowick Street Environmental Works	167,480	4,565	167,480		0
City Centre Enhancements	25,650	71	25,650		0
Well Oak Footpath/Cycleway	59,940	42,855	59,940		0
Exhibition Way Bridge Maintenance	45,000	2,175	45,000		0
Northbrook Flood Alleviation Scheme	200,000		0	200,000	0
Purchase of Land	280,000		280,000		0
Paris Street Roundabout Landscaping & Sculptural Swift Tower	43,740		43,740		0
Heavitree Environmental Improvements	22,880		22,880		0
Ibstock Environmental Improvements	3,240		3,240		0
Planting Improvements in Riverside Valley Park	14,910		14,910		0
Central Station Environmental Works	185,000		185,000		0
MAINTAIN THE ASSETS OF OUR CITY					
Topsham Lock Leak	35,000	33,989	33,989		(1,011)
Verney House Window Replacement	60,000		60,000		0
OTHER					
Replacement of Car Park Pay & Display Machines	230,000		230,000		0
PROSPEROUS CITY					
Science Park	675,990	559,568	559,568		(116,422)
137 Cowick Street	3,160		3,160		0
SAFE CITY					
Security Measures for Riverside Valley Park	1,900		1,900		0
ECONOMY & DEVELOPMENT TOTAL	**2,554,310**	**720,863**	**1,960,727**	**476,150**	**(117,433)**

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY
5 SEPTEMBER 2013

EXECUTIVE
17 SEPTEMBER 2013

CITY CENTRE STRATEGY FOR EXETER 2013-2022

1. **PURPOSE OF THE REPORT**

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

1.2 To seek support from Members for the City Centre Strategy document as drafted.

1.3 To seek approval of the draft strategy from Executive.

2. **BACKGROUND**

2.1 The case for a new City Centre Strategy received the backing of the City Centre Management Partnership Board (CCMPB) in 2012 and, following initial consideration of a draft Strategy framework in early 2013, there has been an extensive consultation and listening exercise with a wide range of City Centre stakeholders.

2.2 The extensive listening exercise undertaken in relation to the City Centre Strategy has:

- provided an opportunity to strengthen engagement with the City Centre community – this will be developed through a broadening of the City Centre Management Partnership membership base.
- taken a fresh look at a range of policy areas – building new partnerships to move forward a range of practical projects designed to enhance the City Centre offer (an example of this is the recent multi agency/business workshop on the night-time economy).
- provided an opportunity to reflect on key City Centre strengths and how to build on these.

2.3 A wide range of views have been expressed during the Strategy consultation exercise, but key themes that have emerged can be summarised as follows:

- the importance of strengthening the focus on the evening and night-time economy – ensuring it's lively, that it offers attractions for all and that the City Centre feels like a safe place.
- celebrating and further strengthening the cultural vibrancy of the city and City Centre and delivering a City Centre reputation for exciting and unique events throughout the year and during day and night.
- delivering ease of access into the City Centre.
- ensuring the city's car parks and transport infrastructure support the City Centre's vibrancy & economic wellbeing and encourage both visitor numbers and customer dwell time.
- the importance of street maintenance and cleanliness.

- celebrating and promoting the diversity of the Exeter retail offer as effectively as possible.
- the importance of a City Centre accessible to all.
- realising the full potential of the Cathedral as a major tourist attraction, with the development of a new Cathedral visitor strategy taken forward alongside the City Centre Strategy.
- ensuring that the city's position at the heart of one of the best food producing regions in the country is recognised within the City Centre offer.
- using the uniqueness of the City Centre's layout as a key marketing tool to benefit the city.

2.4 The Strategy has been drafted within the difficult parameters of:

- 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;
- limited availability of City Council capital expenditure;
- 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.

2.5 Once finally agreed, 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, as well as 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:

3.1.1 A brief contextual analysis of the City Centre as it currently stands, 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 brief summary of the proposed delivery framework and an Action Plan.

3.1.2 The purpose of the Strategy is 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);
- present a positive case for City Centre inward investment (and re-investment by existing businesses);
- 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;
- clearly set out partners and lead agency responsibilities for the implementation and delivery of the Strategy Action Plan.

3.1.3 Action Plan targets are summarised under the following key aims:

- A sustainable, resilient and competitive City Centre.
- A vibrant City Centre that offers attractions for all.
- A welcoming and safe evening and night-time environment.
- A better first impression.
- A clean, well maintained and safe environment.

3.1.4 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.

3.1.5 The Strategy Action Plan does not seek to provide an exhaustive list of projects, rather the objective is to highlight key areas for action and to provide a framework for further detailed dialogue and debate.

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.

4.2. Draft projects carry a clear indication of lead agency/organisation/business, lead individual, timescale and, where identified, likely funding streams. A number of projects will develop over the lifespan of the Strategy and in a significant number of cases the Strategy is about ‘putting a marker’ down on the need to make progress against a number of policy areas.

4.3. The intention is to publish the City Centre Strategy in a more attractive format than its current draft text-based presentation during Autumn 2013 and with an appropriate level of publicity.

5. RECOMMENDED that

5.1 Scrutiny Committee – Economy Members comment on the final draft of the City Centre Strategy.

5.2 Executive approve the draft City Centre Strategy.

JOHN HARVEY
CITY CENTRE MANAGER

RICHARD BALL
ASSISTANT DIRECTOR ECONOMY

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

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A City Centre Strategy for Exeter

2013-2022

Building on a Decade of Change –

Delivering a Competitive and

Attractive City Centre

Final Draft August 2013

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EXECUTIVE SUMMARY

Exeter City Centre – at the heart of a large catchment area – is a successful regional shopping and visitor destination. A wide range of retailers – independents and major names, good accessibility, a rich historical heritage, good cultural mix and excellent environment all make for a great City Centre. Key to the continued success of the City Centre will be to encourage more visitors and maximise their 'dwell time', and ensure that the experience that all City Centre users get is varied and first-class.

This Strategy builds on the 2007-2012 City Centre Strategy, which spanned the period of the most significant change for the City Centre in over 30 years, with major development and inward investment.

This Strategy commences with an assessment of the current City Centre position, undertakes an assessment of the context provided for the Strategy by the successes of the last decade and the Vision for a Green City Centre and then sets out the key City Centre aims for the next 5-10 years. Key City Centre aims are identified as:

- Aim 1 – A sustainable, resilient and competitive City Centre;
- Aim 2 – A vibrant centre which offers attractions for all;
- Aim 3 – A welcoming and safe evening and night-time environment;
- Aim 4 – A better first impression;
- Aim 5 – A clean, well maintained and safe environment.

Aims 1-5 provide a framework within which project aspirations are set out in the Strategy Action Plan. The Action Plan does not seek to provide an exhaustive list of projects, rather the objective is to highlight key areas for action and to provide a framework for detailed dialogue and debate on how the City Centre ensures it continues to work as both a major regional retail hub and as a visitor and leisure destination. The Action Plan is split in to three headings:

- Projects only deliverable through a City Centre BID;
- Key projects for City Centre strengthening and growth;
- Essential day to day operations.

BACKGROUND

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 is impressive:

- 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;
- Employment growth in Exeter during 2008-2010 stood at 4.3%, compared to -6.4% in Plymouth, -0.7% in Bristol and -0.9% in the South West as a whole;
- During 2012, the Royal Albert Memorial Museum was named Museum of the Year (The Art Fund), the University of Exeter was named University of the Year (The Sunday Times) and Exeter College was named College of the Year (Times Educational supplement).

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.

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 Exeter is well positioned to move on to underline its regional strength and cement its position within the premier league of UK cities.

CACI uses a number of measures to rank UK centres:

- *Physical distance to (or time taken to reach) the centre*;
- *The 'Attractiveness' of the centre's facilities'* – scored by looking at turnover from multiples and department stores, counting independent comparison goods retailers and the count of 'footfall generators' (such as banks and restaurants) in each centre;
- *Level of competition*;
- *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 into the top 30.

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.

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 it. 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 is safe, on whether it is full of activities 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.

The growth in the number of City Centre residents has been a key feature of City Centre development during the last decade. It is vital that the City Centre is seen as ever more welcoming, lively, safe and clean and that, through building links with local organisations, charities, schools and community groups, it also links and strengthens community engagement in the City Centre.

This strategy sets out a vision for a further decade of City Centre progress 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.

This Strategy, owned by the City Centre Partnership, is the output from a period of extensive consultation with the public, businesses and key stakeholders. The consultation has been encouraging, in that there has been broad support for the direction that is proposed for the City Centre. Key issues that have been highlighted however are:

- The importance of strengthening the focus on the evening and night-time economy – ensuring that it offers attractions for all and that the City Centre feels like a safe place.
- Ensuring that the City Centre has an exciting and diverse cultural brand, becoming a City Centre that has a reputation for exciting and unique events throughout the year and during day and night.
- Ensuring that delivering ease of access into the City Centre is a key focus for all partners responsible for driving the City Centre forward.
- The importance of street maintenance and cleanliness.
- Ensuring the diversity of the Exeter retail offer is celebrated and promoted as effectively as possible.
- The importance of a City Centre accessible to all.
- Ensuring that the full potential of the Cathedral as a major tourist attraction is realised, with the development of a new Cathedral visitor strategy taken forward alongside the City Centre Strategy.

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.

City Centre Strategy 2007-12

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.

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, Cath Kidston, 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 bus and 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.

Vision for a Green City Centre

A 'Green Vision' for Exeter City Centre was published by the City Council in 2011. The Vision was commissioned by Exeter City Council and prepared by LDA Design, with input from a range of key stakeholders. The vision sets out a broad framework for City Centre development, recognising the importance of continued change, renewal and development, whilst also protecting Exeter's fundamental character.

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. The Vision provides the framework for this City Centre Strategy.

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.

'Space for Growth'. The most obvious location to extend and develop the City Centre is outside the city walls as follows:

- The Development to the east of the city wall adjacent to Princesshay provides a significant opportunity for further City Centre investment and development (the East Quarter);
- 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;
- There are a number of different potential forms new East Quarter development could take. Work on moving development forward 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;
- 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.

'Balancing the Effects of Growth'. Parts of the existing City Centre are not working as well as they could.

- 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;
- 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;
- Investment in the Guildhall area is a critical second "Big Move". Guildhall development is critical in balancing changes proposed in the East Quarter.

'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 strategic aim.

'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.

'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.

- 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.
- 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.

In addition to the four "Big Moves", there are 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.

WHERE ARE WE NOW?

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.

There is a fantastic level of support within the city community for the growth, development and strengthening of the City Centre – essential as the City Centre has to respond to the local and national economic challenges and structural change within the retail and leisure sectors. In continuing to drive the City Centre forward 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 – A sustainable, resilient and competitive City Centre – 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, Park and Ride facilities and cycle network, arguably the best of any major centre in the South west peninsula;

Aim 2 – A vibrant City 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 3 – A welcoming and safe evening and night-time environment

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

Aim 4 – 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 5 – A clean, well maintained and safe environment,

- the city is perceived as clean – but there needs to be an improvement in how well maintained and clean our public spaces are.
- 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;

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.

Despite the many positives, the 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'.

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.

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%.

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.

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.

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 excessive alcohol consumption 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 3 (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.

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.

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.

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'.

DELIVERING THE STRATEGY

During the period covered by the Strategy, it will be very important to both:

- maintain a positive momentum behind how the City Centre develops and responds to the challenging environment;
- ensure that the benefits of a successful, attractive and competitive City Centre are felt by both existing City Centre businesses and potential new names to the City.

The Strategy contains five broad aims, all developed in consultation with a wide range of Exeter stakeholders:

1. **A sustainable, resilient and competitive City Centre;**
2. **A vibrant City Centre which offers attractions for all;**
3. **A welcoming and safe evening and night-time environment;**
4. **A better first impression;**
5. **A clean, well maintained and safe environment.**

Progress needs to be made against each of these aims as follows:

1 – A sustainable, resilient and competitive City Centre

- Maintain a momentum of 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 improvement can only be delivered with effective joint working.

2 – A vibrant City Centre which offers attractions for all

- 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.

3 – A welcoming and safe evening and night-time economy

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

4 – A better first impression

- 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.

5 – A clean, well maintained and even safer environment

- Ensure the city centre maintains its reputation as a clean place – but place a greater focus on the maintenance of public spaces.
- Do more to make people *feel* safe in the City Centre, 24 hours a day.
- Deliver specific projects to tackle the minority of individuals who engage in criminal activity, anti-social behaviour and disorder, both during the day and at night.

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 is likely to be an essential step in this realignment. It is worth flagging that there has been consistent, and substantial, funding for the City Centre from the public purse over recent years. In 2012 alone, the City Council spent in excess of £1.5m on improvements to Paris Street & Sidwell Street and improvements to King William Street car park. £660,000 has been identified from the public purse for Central station forecourt improvements. On an annual basis, the City Council spends £750,000 on CCTV, £2.8m on the Royal Albert Memorial Museum and £250,000 on tourism, city centre management, events and festivals.

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, competitiveness, safety, accessibility, 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 commitment' on delivering the City Centre change agenda;
- the best possible environment for nurturing and harnessing the growth potential of independent businesses.

There are three key pre-cursors to the potential delivery of a BID project:

- Re-focussing and re-energisation of the City Centre Partnership is a key priority. A new City Centre Partnership Board will be needed – that is fully representative of the full range of businesses operating within the City Centre, of all of the City Centre stakeholders that make the City Centre a cultural, visitor and business hub and that fully represents all the geographical sectors of the City Centre (to include the Quayside).

- Delivery of a series of ‘street committees’ across the City Centre, to strengthen engagement with businesses in those streets traditionally identified as ‘secondary’ retailing areas, but streets in reality that provide the essential vibrancy of the City Centre so critical to ensuring Exeter is seen as more than simply a traditional shopping location;
- Strengthened working arrangements between key businesses, to ensure a more ‘corporate’ Exeter message on a wide range of issues, from extended opening hours to co-ordinated seasonal promotions.

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 (BID) there will be significant difficulties in maintaining the positive momentum achieved in the City Centre over the last decade. Delivery of a BID is set out as the first key project within the Strategy Action Plan.

The Action Plan does not seek to provide an exhaustive list of projects, rather much of its focus is on highlighting key areas for action, with a need in many cases for issue and area-specific strategies and plans to be developed. The Action Plan will be reviewed, and re-issued, on a rolling two year basis throughout the lifespan of the Strategy.

Areas highlighted within the Action Plan are prioritised as follows:

- Projects only deliverable through a City Centre BID;
- Key projects for City Centre strengthening and growth;
- Essential day-to-day operational issues.

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

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

Action Plan

Projects only deliverable through a City Centre BID

Aim 1 – A sustainable, resilient and competitive City Centre

Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Objectives/Outcomes**
Business Improvement District (BID)	Spring 2014 target for BID ballot	Chamber of Commerce City Centre businesses Exeter City Council Devon County Council BID feasibility study & campaign – minimum of £30k	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.
Retailer inward investment targeting	Reviewable targets list First list 2015	Exeter City Council Private landlords Chamber of Commerce BID £8,000 p.a.	To further strengthen Exeter's competitive position by strengthening the representation of significant retail names in the city.
Improved presentation of vacant retail units On-going development of initiatives for use of vacant retail units	On-going	Exeter City Council Private landlords BID £10,000 p.a.	To enhance the visitor experience. To create a better trading environment for all businesses.

Aim 2 – A vibrant City Centre that offers attractions for all

Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Renovation and regular Summer use of Northernhay bandstand	2015	Exeter City Council BID Lottery funding Corporate business sponsors £50,000	To deliver increased vibrancy in (& use of) Northernhay Gardens – reducing incidents of anti-social behaviour and encouraging wider use of a key City Centre park.

Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
City Centre WiFi and 4G	2015	City Centre businesses BID Exeter City Council Private sector providers City Centre landlords	Delivering a more business and customer friendly City Centre.
Aim 3 – A welcoming and safe evening and night-time environment			
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Purple Flag Award or appropriate alternative quality scheme	2015	Devon & Cornwall Police Exeter City Council University of Exeter BID Community Safety Partnership	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: • A raised profile and an improved public image for the City Centre; • Increased visitor numbers; • Increased expenditure; • Further reductions in levels of crime and anti-social behaviour; • The delivery of a more successful mixed-use economy.
Aim 4 – A better first impression			
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
City Champions/Ambassadors	2015	Exeter City Council Chamber of Commerce Exeter & Heart of Devon Hoteliers and Restaurants Association City Centre businesses	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. This will lead to improved perceptions of Exeter as

		BID	friendly & safe, leading to increased return visits & trade.
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Improvement to Cathedral & Quay Car Park/City Centre links through South Street, Coombe Street and to the Quayside	2017	Exeter City Council Devon County Council BID	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 Devon County Council BID	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.
Aim 5 – A clean, well maintained and safe environment			
Project	**Year**	**Lead** **Partners**	**Outcomes**
Child Safe Zone – expanding scheme beyond the Guildhall Shopping Centre/Princesshay	2015	City Centre businesses Exeter City Council Devon & Cornwall Police	To deliver a more family-friendly shopping environment, further strengthening competitive position over other regional shopping locations.

Key projects for City Centre Strengthening and Growth

Aim 1 – A sustainable, resilient and competitive City Centre			
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Redevelopment of the Bus Station	Target start date – 2015	Exeter City Council Land Securities Devon County Council Stagecoach	To deliver a step-change in the City centre leisure and retail offer and deliver a state-of-the art bus station and modern swimming pool complex.
West Quarter Development Strategy	2015	Exeter City Council Fore Street Business Collective 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.
Visitor Coach Parking Strategy	Report – Spring 2014	Exeter City Council Heart of Devon Tourism Partnership	To enhance the City Centre visitor experience. To encourage repeat visits.
Park & Ride expansion	On-going strategy development	Devon County Council	To deliver easier access to the City Centre, improving travel options for visitors, shoppers and city workers.
Sunday Trading Hours	As legislation comes forward	City Centre businesses Exeter City Council Public transport operators	To capitalise on any long-term changes to the Sunday trading regulations – strengthening the City Centre's competitive position.
Aim 2 – A vibrant City Centre that offers attractions for all			
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Delivering an action plan for 'showcasing' local food producers more effectively within the City Centre – to also include analysis of options for developing 'edible city' initiatives	Initial plan of action – 2014	Exeter Chamber of Commerce Private sector partners Real Food Store Exeter City Council	To strengthen links between City Centre and key local food producers. To deliver increased City Centre interest and attractiveness.

Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Developing the 'Castle Quarter'	2014 – completion of feasibility study/delivery strategy	Exeter City Council Exeter Phoenix Devon County Council Exeter Chamber of Commerce	To strengthen the overall offer of the City Centre – ensuring visitors are encouraged to visit the greatest possible range of city attractions and to move beyond the 'core' City Centre area and to maximise City Centre dwell time.
Review of use of Northernhay & Rougemont Gardens and Southernhay	2014	Exeter City Council Exeter Chamber of Commerce Devon County Council	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 parks.
Christmas Lights	On-going	Exeter City Council Exeter Chamber of Commerce Corporate business sponsors City Centre businesses BID Core 'baseline' City Council budget of £14,500 agreed for 2013, 2014 & 2015	To deliver a funding package to ensure the delivery of Christmas Lights that are unique, innovative and that support the City Centre's competitive position.
Aim 3 – A welcoming and safe evening environment			
Project	**Year**	**Lead Partners – and cost estimate (where identified)**	**Outcomes**
Develop a clear Strategy for the development of the evening and night-time economy	2013/14	Devon & Cornwall Police Exeter City Council City Centre licensees City Centre businesses Community Safety Partnership	To secure the safest possible evening and night-time economy, ensuring a positive reputation for the City Centre as a visitor destination during the evening and night-time period.

Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
To examine the potential of Early Morning Alcohol Restriction Orders	2014/2015	Devon & Cornwall Police Exeter City Council City Centre licensees City Centre businesses Community Safety Partnership	A new power that should be considered. Potential 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. Potentially significant savings in relation to policing costs and cleansing & maintenance.
Taxi Marshalls	2013 Development on-going	Devon & Cornwall Police Exeter City Council University of Exeter Community Safety Partnership Exeter Businesses - BID	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.
'Safe Zone'	2015	Exeter City Council Devon & Cornwall Police Street Pastors City Centre licensees NHS Community Safety Partnership	To create a place of 'refuge' in the City Centre during the night-time period – to potentially include a new Street Pastors base and the provision of a Health Triage service.
Aim 4 – A better first impression			
Project	**Year**	**Lead Partners – and cost estimate (where identified)**	**Outcomes**
Central Station Forecourt enhancement	2013	Devon County Council Exeter City Council Network Rail £660,000	To deliver the best possible first impression to City Centre visitors and ensuring a sense of 'arrival'.
West Quarter enhancements ('The Hill')	2015	Exeter City Council Local businesses Devon County Council	To strengthen West Quarter as a key hub of independent businesses and café culture, driving footfall and 'signposting' West Quarter businesses.

Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Connecting Fore Street, South Street, the 'West Quarter' & the Quayside	2015	Exeter City Council Devon County Council	To deliver improved pedestrian spaces, improve accessibility through, and minimise the impact of traffic in, the West Quarter. In turn this will strengthen the attractiveness of the area to visitors and shoppers and improve links between the City Centre and Quayside.
Exeter St David's Station Forecourt	2015	Exeter City Council 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.
Public Toilet provision (to include Community Toilet Scheme)	On-going	Exeter City Council Exeter Chamber of Commerce City businesses	To improve provision of public toilets in terms of quality and accessibility. To ensure accessibility of toilets is excellent for all parts of the community.
Aim 5 – A clean, well maintained and safe environment			
Extend the EBAC radio network to cover all City Centre pubs and clubs and other venues where appropriate	2014	City Centre businesses Exeter City Council Devon & Cornwall Police Licensees Association Minimal cost to City Council Cost to business of approximately £450 per radio	To deliver a safer, more welcoming City Centre during the evening & night-time period.
Expansion of Exeter Businesses Against Crime (EBAC)	Annual improvement plan	City Centre businesses Exeter City Council Devon & Cornwall Police Nil cost to public sector Annual costed 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.

Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Launch of 'Diverted Giving' & 'Suspended Food/Drinks' scheme	2013 launch Annual development plan	City Centre businesses Exeter Community Safety Partnership Exeter City Council Devon & Cornwall Police	To deliver a safer, more welcoming City Centre during the evening & night-time period.

Essential day-to-day operational issues

Aim 1 – A sustainable, resilient and competitive City Centre			
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Customer-convenient trading hours	Annual Progress Report	City Centre businesses Public transport operators Exeter & Heart of Devon Hoteliers & Restaurants Association Exeter City Council	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.
Review of street markets – identification of opportunities for significant development	Options report – Summer 2014	Exeter City Council	Identification of opportunities for growth and enhancement of City Centre markets, with a view to enhancing City Centre vibrancy, attractiveness and dwell time.
Year-round Markets	On-going	Exeter City Council	To deliver increased City Centre vibrancy with a year-round series of specialist markets – building on the delivery of the 2012 Cathedral Christmas Market.
Regular PI monitoring and reports	Annual Progress Report	City Centre Manager Exeter City Council City Centre businesses	To ensure the decision-making process is well informed, with reliable and up to date information on City Centre performance
Aim 2 – A vibrant City Centre that offers attractions for all			
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Review of street trading/street trading regulation across the City Centre. Deliver a City centre focus on street food.	2014	Exeter City Council Devon County Council Exeter Chamber of Commerce City Centre businesses	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.

Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Continued development of Exeter Trails – for independent cafes, food, arts & crafts, vintage & boutique and sports & leisure	Annual plan	Exeter businesses Exeter City Council Opportunities to link to development of Exeter App £10,000 City Council funding to first series of maps	To deliver a better and more varied visitor experience. To enhance vibrancy of City Centre. To support a key component of the City Centre 'offer'.
Christmas Market	Annual (first year – 2012)	Exeter Cathedral Exeter City Council Exeter Chamber of Commerce Exeter & Heart of Devon Hoteliers & Restaurants Association	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.
Betting Shops – Review of Policy/Provision	2014	Exeter City Council	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.
Aim 3 – A welcoming and safe evening environment			
Project	**Year**	**Lead Partners – and cost estimate (where identified)**	**Outcomes**
Support the activities and initiatives of the Exeter Alcohol, Violence & Night time Economy Group	On-going	City Centre businesses Community Safety Partnership Exeter City Council Devon & Cornwall Police Public transport operators	To deliver improvements to the Exeter evening and night-time economy, ensuring the City Centre is an attractive and safe place in the evening for the broadest possible cross-section of the community.
To review the practicalities of a scheme identifying 'problem' premises – with the potential rolling publication of the top 5 problem premises.	On-going	Devon & Cornwall Police Exeter City Council City Centre licensees	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.
Taxi Rank Provision	On-going	Devon County Council Devon & Cornwall Police	Rank location, size and management have a major proven impact on safe and efficient dispersal of late-

		Exeter City Council	night economy users.

Aim 4 – A better first impression			
Project	**Year**	**Lead** **Partners** **– and cost estimate (where identified)**	**Outcomes**
Street Scene – 'Scores on the Floors' Scheme and other partnership working	2014/2015	Exeter City Council City Centre businesses Chamber of Commerce	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 deliver a cleaner, brighter City Centre and a more attractive and successful trading location.
Taxi Forum	2013 and on-going	Exeter City Council Taxi operators Devon County Council	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: • 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; • Ensure that taxi provision (including the location of City Centre taxi ranks) is convenient and clearly 'signed'; • Promote a positive and distinctive image for Exeter taxis.
'Chuggers' Policy	2014	Exeter City Council Exeter Chamber of Commerce Charity Commission	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.

Aim 5 – A clean, well maintained and safe environment			
Project	**Year**	**Lead Partners – and cost estimate (where identified)**	**Outcomes**
Delivery of an annual action plan on street & paving maintenance	Annually	Devon County Council	To deliver a better visitor experience
Expansion of Exeter Businesses Against Crime (EBAC). Annual Improvement Plan	Annual improvement plan	City Centre businesses Exeter City Council Devon & Cornwall Police	To deliver a safer, more welcoming, City Centre, ensuring the City Centre becomes less of a target for shoplifters, criminal activity & anti-social behaviour.
Delivery of a co-ordinated anti-begging strategy (see also 'Diverted Giving' project)	Annually – six-monthly progress review	Exeter City Council Exeter Community Safety Partnership Exeter Community Initiatives Devon & Cornwall Police City Centre businesses £1,500 for initial launch publicity – Community Safety Partnership	To deliver a safer, more welcoming, City Centre

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

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

EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY
5 SEPTEMBER 2013

PETITION - MAGDALEN ROAD CAR PARK CHARGES

1. PURPOSE OF THE REPORT

1.1 To report to Scrutiny Committee on the petition that was submitted to full Council on 16 July concerning parking charges at Magdalen Road car park and to seek Members' views.

2. PETITION

2.1 The petition read as follows:

"As I am sure you are all aware of the recent price increase at Magdalen Road (formerly known as Fairpark) car park. Whilst I support the need to reduce pollution from cars in our city centre, my fear is this change increase is driving the regular visitors out of our city, for whom the motor car is a necessity and not a luxury, to the detriment of local business. So that said, I wish to invite you to voice your opposition to both this and future disproportional Parking Charge Increases."

The petition received 438 signatures.

3. BACKGROUND

3.1 In 2011 the Council agreed to establish an all-party Car Parks Task and Finish Group to consider options for protecting and maximising income from the council's car parks against the backdrop of very serious economic and financial challenges. Members have previously received and agreed the recommendations of this Group, but in summary the Group concluded that the overall level of parking charges in Exeter was comparable to that in similar cities of regional significance and economic importance. It recognised the importance of the level of charges in respect of the health of the local economy, the retail environment and visitor attractions, but also recognised that the charging structure was, at the time, overly complicated.

3.2 Among the Task and Finish Group's recommendations were that the overall tariff structure be simplified and Magdalen Road (then Fairpark) and Howell Road car parks be re-designated as short-stay car parks in order to generate turnover of spaces and thus support traders. These recommendations were agreed by Executive.

4. IMPACT OF CHANGES

4.1 Although it is too early to draw meaningful conclusions from car park income or ticket sales data; income from Magdalen Road car park has risen slightly in the period March to June although ticket sales have dropped. The initial reduction in use was to be anticipated given that the impact upon those that previously parked for long periods is immediately apparent, whereas it will take longer for short term users to become aware of the additional availability of parking and travel behaviour to change accordingly.

4.2 The change in designation of Magdalen Road car park seems to have achieved the objective of freeing up additional short term shopper's parking spaces. Lowering charges in a car park that is designed to assist traders is self-defeating, since the facility becomes a commuter car park which, from early in the morning until the end of the working day, has no available spaces for those wishing to shop. The change of tariff has encouraged those parking all day to make use of long-stay car parks which are specifically priced to cater for commuters and others who wish to stay for long periods.

4.3 The petitioners believe parking charges are acting as a detriment to local businesses by driving out visitors to the city, and this is a view that seems increasingly to be gaining exposure. However, it is not clear what evidence is being used to establish this 'cause & effect', since there are many other very significant factors – sustained real cuts in incomes, reductions in benefits, a desire on the part of households to pay down debt rather than spend money and a consequent weakness of demand and growth right across the economy – that are major contributors to the very difficult environment faced by businesses, and are arguably far more significant than parking charges (that will typically form only a small proportion of the total costs of a shopping or leisure trip). While in no way wishing to minimise the genuine concerns of the petitioners, officers remain of the view that traders are best supported by a pricing structure that encourages regular turnover rather than one that results in all car parks becoming commuter parking facilities from early in the morning. The present tariff structure caters for a variety of different users, and continues to generate an essential income stream for the city, in line with the objectives of the Task & Finish Group.

5. RECOMMENDATION that:

Members note the petition and debate the issues raised.

ASSISTANT DIRECTOR PUBLIC REALM

<u>Local Government (Access to Information) Act 1985 (as amended)</u>
Background papers used in compiling this report:

None

EXETER CITY COUNCIL

SCRUTINY COMMITTEE - ECONOMY
5 SEPTEMBER 2013

TRANSPORT INITIATIVES AND ISSUES - UPDATE

1 PURPOSE OF REPORT

1.1 This report is to update Members in relation to transport initiatives and issues affecting Exeter.

2 BACKGROUND

2.1 Responsibility for transport rests with numerous organisations, including the Department for Transport (DfT), Devon County Council (DCC) as Local Transport Authority, and private operators like First Great Western and Stagecoach who run the trains and buses. The Local Enterprise Partnership (LEP) is also gaining an increasing role in transport issues, with funding for major schemes now devolved to Local Transport Boards (LTBs) based on LEP geography.

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

(a) As local planning authority, we plan the location of development in relation to transport networks. We work closely with Devon County Council in this regard; the City Council's spatial planning policies informed production of DCC's Local Transport Plan, and conversely DCC produced a body of evidence to support our adopted Core Strategy. A product of this collaboration is the Devon Metro proposals, discussed below at paragraph 3.2, whereby it is proposed to serve Exeter's new development areas by an improved rail system.

(b) Also as local planning authority, we endeavour to ensure that new development is designed to maximise use of sustainable travel modes. See paragraph 7.2 below.

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

(d) We respond to consultations from government and elsewhere (see for example paragraph 6.2).

(e) We also deal with the licensing of taxis and private hire vehicles, although this is outside the scope of this report.

2.3 It will be seen from the content of this report that in many cases Exeter City Council's involvement in projects is as more than a mere consultee. Much of our input into transport issues is through working in partnership with DCC, and influencing decisions made by them and others to ensure that Exeter's interests are promoted. Our views on transport matters are conveyed to the LEP via the Exeter and Heart of Devon Growth Board and through participation by the Projects and Business Manager in the LEP's own Transport Special Interest Group.

3 RAIL

3.1 This Committee has previously resolved to endorse DCC's Devon Metro proposals, and to support the principle of working with DCC and other stakeholders to lobby for rail improvements.

3.2 A summary of the Devon Metro proposals is included as Appendix 1. They include new stations at Newcourt and Marsh Barton and, in the longer term, Monkerton/Hill Barton. Newcourt has now received planning permission, together with money from the New Stations Fund to supplement section 106 contributions, and the aim is now to build it during 2014.

3.3 The process for awarding the new Great Western franchise was interrupted by the review of the franchising system, following legal action by Virgin in relation to the West Coast franchise and discovery of errors by the DfT. The Department is currently negotiating terms with First Great Western for a temporary contract from this October, with a new long-term franchise now scheduled to begin in July 2016. We have been active in impressing upon the DfT that this temporary contract must not result in a loss of momentum in improving the system, and it is hoped that the service requirement will include some of the enhancements which we were expecting as part of the new full-term franchise.

3.4 The national shortage of rolling stock continues to cause problems, particularly on our local lines where passenger numbers are continuing to increase. At least it appears that our demands for more and better carriages are likely to be satisfied when the Thames Valley services are electrified in 2016 and stock is available for cascade, as Network Rail's spending plans include gauging work to enable these wider vehicles to operate in the south west. Although it remains difficult to get any other commitment to improving the infrastructure locally, current works at Reading and those planned in future for the Bristol area will improve the reliability of our intercity services when complete.

3.5 Frequent disruption caused by flooding last year, particularly in November and December, has prompted Network Rail to draw up a list of projects to address this issue, not only at Cowley Bridge but also at other locations further up the line. Implementation of these schemes is dependent on funding in the region of £31m, and we are pressing the DfT to ensure that these works go ahead.

3.6 The long-awaited plans to improve Central Station forecourt are coming to fruition with work starting on site around now. The plans (included as Appendix 2) envisage removal of vehicles from the crescent, to enable improvement of the environment for pedestrians, since the majority of journeys to and from this station are made on foot. The Council is making a contribution of £185,000 to a scheme costing around £660,000, which will complement the significant improvements already carried out at this station by the rail industry under the National Stations Improvement Programme.

4 OTHER PUBLIC TRANSPORT DEVELOPMENTS

4.1 The city's bus network continues to expand and improve to serve new developments, notably Newcourt (route J). New route 4 to Cranbrook has introduced a regular half-hourly service along Honiton Road, and route B through the city now has a Sunday service for the first time following its extension to Exminster.

4.2 The opening of the John Lewis store in October 2012 was accompanied by a campaign encouraging shoppers to use public transport. Stagecoach extended the evening service on the Red (Honiton Road) park and ride to include John Lewis's extended opening hours for the benefit of shoppers and staff. The opening went smoothly with no significant traffic congestion, and a large increase in passenger numbers on bus, rail, and park and ride (over 25% increase on the same period in 2011 on local rail lines and the Red park and ride). By way of contrast, the approach to Christmas proved particularly challenging in terms of traffic congestion, showing that more can be done to encourage use of public transport.

4.3 Three interactive versions of the red information "monoliths" will be installed imminently. These will display real time train information, to enable visitors and shoppers to see how their train is running before setting off for the station. Park and ride and bus information is also included. The two monoliths in the city centre (in Princesshay and outside John Lewis) are principally being funded by developer contributions from Princesshay, with the City Council having made a contribution to add interactive mapping. Separate developer contributions from the former County Ground have enabled the third monolith to be provided in St Thomas.

5 ROAD IMPROVEMENTS AND OTHER MAJOR SCHEMES

5.1 As mentioned in paragraph 2.3, funding for major schemes has now been devolved to the Local Transport Board, although the indicative amount of funding available has been reduced by the Government since the setting up of Single Local Growth Funds. In July the Board agreed that a number of schemes were worthy of financial support during 2015-19 and should therefore be progressed, including the outbound widening of Bridge Road (also receiving a contribution from the Regional Growth Fund) and Marsh Barton rail station.

5.2 One omission from schemes presented to the Board was a replacement bus and coach station. The principal benefits from this scheme would be economic ones, in terms of the land released for other uses, so it is likely to be a more suitable candidate for an application to the LEP's future Single Local Growth Fund, rather than to a funding stream purely for transport projects, although all possibilities for unlocking this important project will be investigated. It is essential that the replacement facility not only functions well as a bus station, but provides a welcoming gateway to the city. Now that improvements to the rail system are making good progress, the bus station has to become a top priority, and proposals are being worked up by DCC.

5.3 Alphington Park and Ride was considered by the LTB but was included in a reserve list and alternative sources of funding will need to be explored by DCC. The scheme also lacks planning permission. However, it remains an important component of the Council's future transport strategy, supported by our Local Development Framework.

5.4 The Tithebarn Lane link road, required to open up development sites in Monkerton and across the motorway in East Devon, has been awarded £1.75m from the DfT's Local Pinch Point Fund. Further contributions from the Regional Growth Fund and developers will enable the construction of the first stage of the road (from Cumberland Way to the Science Park Drive).

5.5 Further afield, it was announced in the Comprehensive Spending Review in June that a feasibility study would be funded into further dualling of the A303/A30/A358 corridor. The Council has supported the case for this, as any improvements would increase journey time reliability, as well as resilience through providing a genuine alternative to the M5.

6 AVIATION

6.1 The Council recognises the importance to the city of Exeter International Airport, both in terms of connectivity and the high quality jobs provided, particularly by Flybe. As a major domestic carrier, the airline is hit particularly hard by Air Passenger Duty (APD). Our tax is the highest of its kind in the world, and although levied in bands according to distance flown, the tax is charged on departures from British airports which means that someone making a return trip to (say) Manchester pays double the APD paid by someone making a return journey to Turkey.

6.2 The UK's regions (outside the south east) are more dependent than London is on domestic air links, and the Council has joined calls for differential rates of APD between London and regional airports. The Council has responded in these terms to the Davies Commission on airport capacity, not only because it would benefit regional economies, but because it would also attract air traffic away from the congested south east, encouraging the development of regional hubs (such as Flybe's hub at Manchester), and postponing or even avoiding the need for expensive new runways in or near London. A similar point has now been made by the Transport Select Committee of MPs. Although the debate about capacity and hub airports tends to be London-centric, it is of relevance to us because a new airport east of London would be difficult for us to access (as it would for much of Britain).

7 CYCLING AND WALKING

7.1 The formation of the Exeter Walking and Cycling Steering Group (comprising officers from ECC, DCC and a representative of Sustrans) was reported to the committee in September 2011. That group continues to promote incremental improvements to the walking and cycling network. Its work programme is attached as Appendix 3; highest priority is given to schemes which have section 106 funding, or which are important strategic links, especially those to cater for significant areas of new development. The group does not have decision making powers; it promotes schemes, whereupon they are subject to normal DCC and/or ECC decision making processes depending on their nature and scale.

7.2 The Sustainable Transport Supplementary Planning Document (SPD) was adopted by the Council in March 2013 and is proving helpful in ensuring that new development is designed to encourage the use of sustainable travel modes.

8 CONCLUSIONS

8.1 Connectivity is essential if Exeter's economic success and competitiveness are to be maintained, and all transport modes have an important part to play. It is therefore important to make the case for improvements to rail including eventual electrification and the western link to Heathrow, a fair deal for regional air connections, and bringing the A303 up to standard. Transport investment is heavily skewed in favour of London, with projects like Crossrail, and HS2 will improve journey times to the midlands and north at our relative expense. We need to keep promoting the case for better connections to Exeter and the far south west.

8.2 With local transport too, the various modes each have a role to play. An analysis of travel to work mode by ward is attached at Appendix 4. This provides a few interesting facts, such as that residents of Mincinglake are the most prolific bus commuters; for rail (unsurprisingly) the honours go to Topsham. Perhaps more important, however, is the joint contribution made by the sustainable modes in keeping down commuting as a car driver to 47.5% (although these are Exeter residents; much of the city's traffic and congestion is caused by drivers travelling from elsewhere). So rather than seeing cycling and rail as catering overall for "only" 6.3 and 2.1% of journeys to work (respectively), we need to recognise the greater contribution they make on specific corridors, as well as their contribution to the impressive 40.5% combined share of "active" travel modes and public transport. It is more difficult to maintain this sustainable modal split with the newer developments on the city's fringes; therefore we keep striving to promote sustainable travel within and from these developments so that the city's attractiveness as a place to live and work is not degraded by worsening congestion and air quality.

9 RECOMMENDED

(i) That Members offer their continued support for the Council's involvement in the initiatives outlined in the report, with the replacement bus and coach station being a high priority.

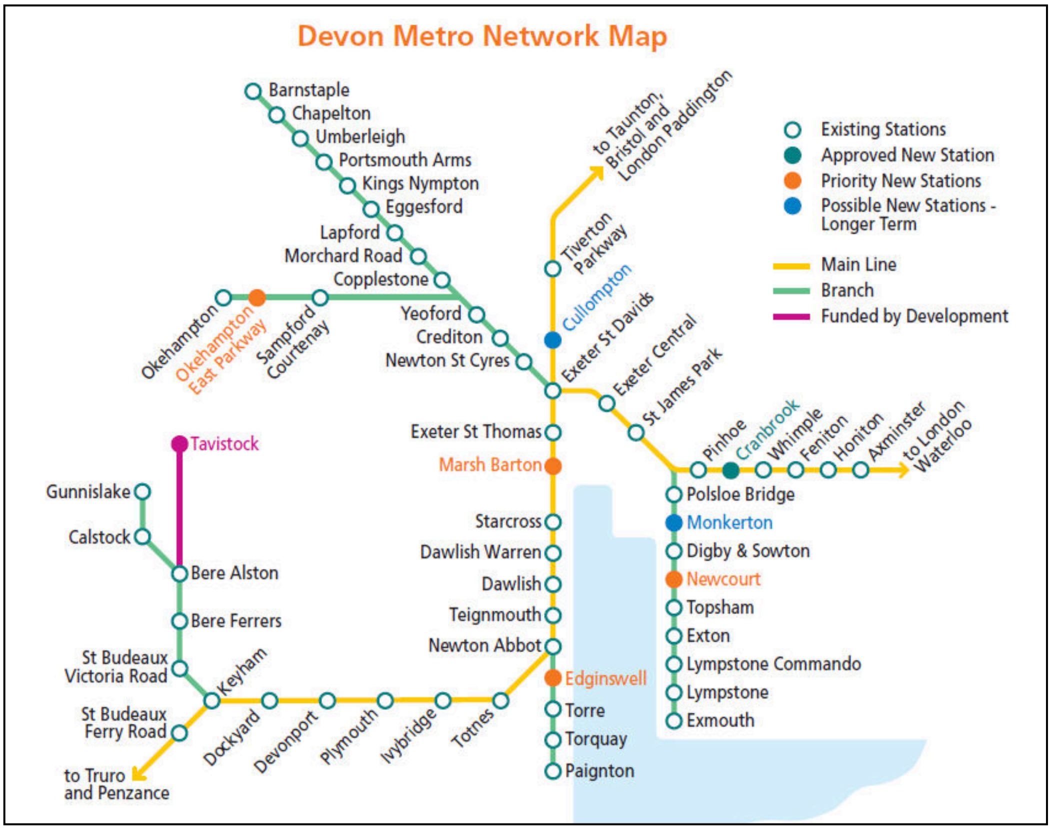
Ross Hussey
Projects and Business Manager

CITY DEVELOPMENT

<u>Local Government Act 1972 (as amended)</u>
Background papers used in compiling this report:
Devon Metro Appraisal Report – DCC 2011
Western Route – Geo-Environmental Resilience (Network Rail, June 2013)
ECC's representations to the Commission on Airport Capacity
2011 Census

APPENDIX 1

Devon Metro proposals



Short term aims

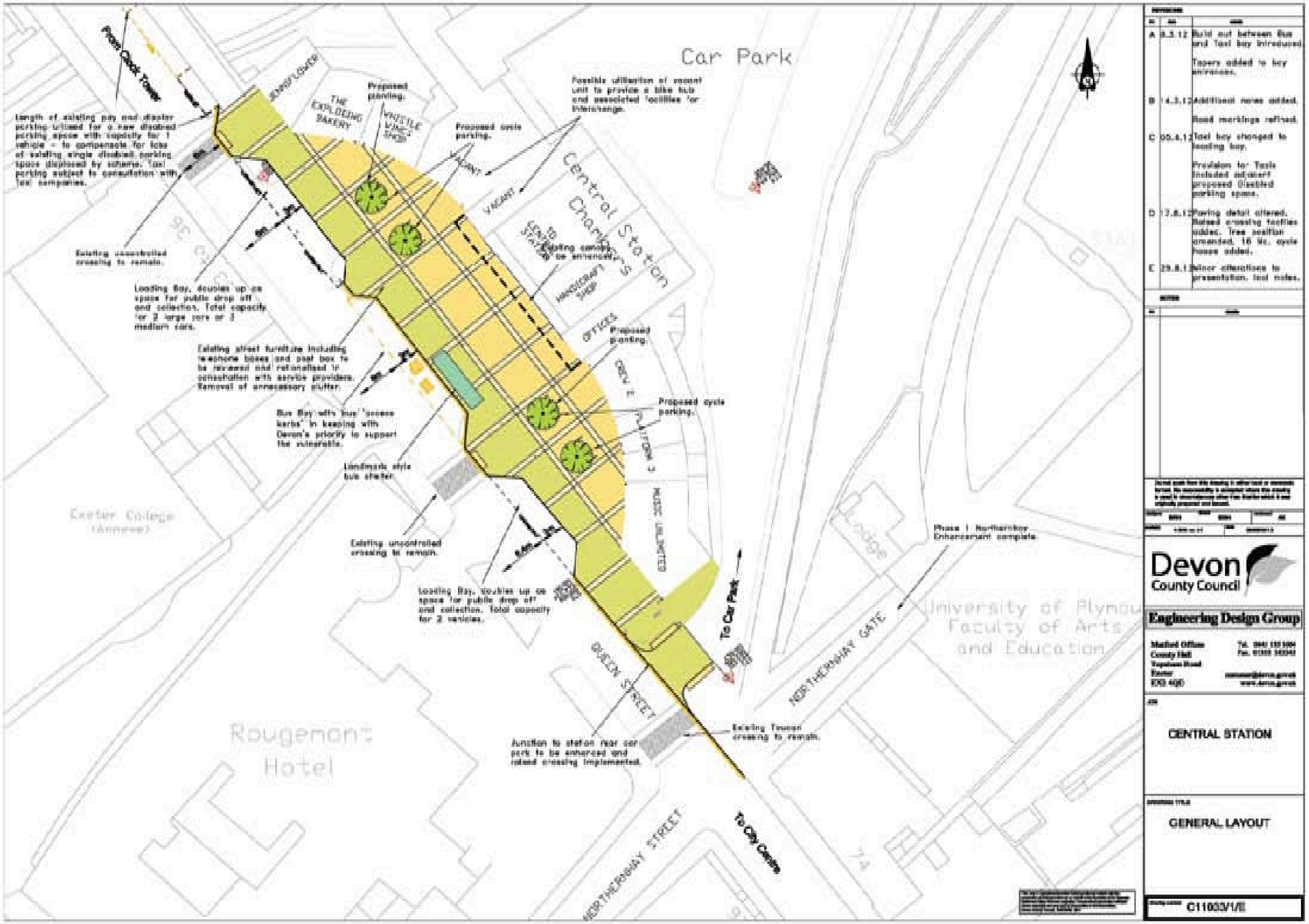
- 4 car trains in the peaks
- New stations at Cranbrook, Newcourt and Marsh Barton
- 30 minute local service frequency on the Paignton line

Longer term aims

- 30 minute frequency to Cranbrook, Honiton and Axminster
- Further new station at Hill Barton
- 15 minute frequency on the Exmouth line
- 15 minute frequency on the Paignton line

APPENDIX 2

Central Station forecourt proposals



APPENDIX 3

Exeter Walking and Cycling Steering Group
Work programme – June 2013

Progress reports – active schemes					
Project	**Ref**	**Description**		**Current position**	
Queen St corridor	007	(a) Pedestrianisation of station forecourt, to include cycle parking. (b) Cycle hub in vacant unit. (c) Enhance corridor generally. (d) Scope for improving Clements Lane.		Works on forecourt likely to take place Sept-Dec.	
Cycle network signing	017	Jacobs have designed signing for Redhayes Bridge to City Centre. To design other routes.		DCC to order for installation for Redhayes route this year.	
Walking map reprint	022	Final proofs prepared.		DCC to deal with printing and distribution.	
Heavitree Pleasure Ground	023	New ped/cycle path through ECC park.		Path completed. Dropped kerb needed at western end.	
Cycle network maintenance	024	Seasonal issues, especially on strategic routes. Needs capital funding from DCC for scraping back verges for path widening. Known problems Bridge Rd – Lime Kilns, Double Locks, Bettys Mead, Crematorium path.		Identify requirements and costs. Sustrans rangers to report other poor locations.	
Flood defence scheme	025	ECC has identified diversionary routes. DCC identifying opportunities for new paths as part of works.		DCC preparing brief to Engineers to work with EA.	
Topsham Ferry	026	Landings at both sides surveyed for possible widening on Topsham side and improved surface on canal side. DCC could provide funding.		Designs being drawn up for works next year. New fingerpost needed on trail at Topsham Ferry to indicate location of ferry.	
Progress reports – watching brief					
Green Circle	001	Regular inspections by DCC and Sustrans volunteer.		June inspection completed by ECC	
Shakespeare Rd to Well Oak	002	Path being provided as part of housing development.		Remedial work required.	
Chancel Lane	005	Scheme comprises east-west ped crossing point by Taylor Wimpey development, and traffic calming.		Being considered by HATOC.	

Clyst Bridge	009	Likely to open Sept. Signing through Topsham dependent on management plan.		Under construction. Consultation on signing held.	
Cowick St improvements	010	Major enhancement scheme.		Aiming to complete Sept.	
Hamlin Lane PF bridge	011	Ped/cycle link including new bridge.		Public consultation in Oct.	
Hollow Lane	012	Strategic cycle route; traffic restrictions proposed. Shared use path needed from Hollow Lane to new primary school entrance.		RTOs prepared for consultation. Design for Hollow Lane with Jacobs. Planning application for school awaited.	
Pinhoe Station Road playing field path	016	Ped/cycle path across open space. Scope to improve link across car park. Potential to link with future residential development to the south.		Car park resurfacing not done because of other possible developments re station parking by DCC on north side.	
Fore St jcts with Friernhay and West St	018	Assorted footway improvements.		No current progress.	
Cycle safety schemes	027	Fore St, Heavitree Fore Street and Heavitree Rd/Spicer Rd junction identified for potential action.		Work this year to identify engineering improvements.	
Stoke Hill school	028	New access paths.		Planning granted; northern link to be constructed this summer.	
Future schemes – high priority (strategic importance; s106 funded; straightforward and low cost)					
Liverpool Hill to Kinnerton Way	003	Strategic link, particularly to Exwick Heights school.		DCC considering options to progress.	
Loram Way	004	Strategic cycle/ped link. NPS negotiating with land owner. Planning permission needed.			
Bromhams Farm and Marsh Barton Rail station	006	Problem with parking on cycle path; scope for reducing parking on this side of canal when parking area provided on Water Lane tip. Scope for improving Clapperbrook Lane / Grace Rd jct for pedestrians and cyclists.		ECC has completed works to develop parking area. Awaiting legal agreement. Scheme being worked up for priority junction.	
Uni to City centre	019	Signing and limited shared use provision using s106 money.		Brief required for engineers to work up.	

Sidwell St right turn markings	020	Right turns for cyclists only from York Road and Summerland St into Sidwell St. Markings requested for cyclists' refuge in centre of road.		With Jacobs to action.	
Barrack Rd links	021	Dropped kerbs needed to avoid pavement cycling where cyclists emerge from Wyvern Barracks and Wellingtonia developments to join Barrack Road.		Costed and ready to be built.	
Ludwell Lane	030	Calming proposed for Ludwell Lane; strategic cycle link being considered. Section 106 money may be available.		Options being considered following site visit.	
St Katherines Road	031	Eastern end needs safe crossing of Beacon Lane.		DCC to brief engineers.	
Fitzroy Road	032	Eastern foot/cycleway to be extended northwards using s106 money.		DCC to design.	
Bus stop improvements	033	Bus shelter replacement programme offers scope for minor relocations / improvements.			
Future schemes - other					
St Peters Mount to Exwick Lane	013	Footpath provided by developer. To be made a PROW.		With DCC PROW to progress.	
Hamlins Lane & St Andrews Rd footway	014	Footpath from Farm Hill to St Andrews Rd to be made a PROW. Short section of footway to be created along western side of St Andrews Rd from Kinnerton Way Roundabout.		With DCC PROW to progress.	
Glasshouse Lane to Sir Alex Walk	015	3rd party partial obstruction of footpath. Damage reported between M5 and reed beds.		ECC dealing.	
Thornton Hill to Hoopern Valley	034	Potential for upgrade to shared use but unknown ownership.		ECC Estates investigating ownership.	
King William St	035	Dropped kerbs and raised tables needed to ease pedestrian crossings from car park. Also improved link to Sidwell St.		Review when time permits.	
St Leonards to City Centre	036	In Walking Strategy; suggestions received from a member of the public.		Schedule after Queen St corridor.	
Western Road	038	Excessive speed humps on road past allotments.		All in DCC ownership. DCC to investigate solutions.	

APPENDIX 4

2011 Census
Travel to work by Exeter residents

	Those in work	Work Mainly at or From Home	Train	Bus, Minibus or Coach	Public transport combined	Motorcycle, Scooter or Moped	Driving a Car or Van	Passenger in a Car or Van	Bicycle	On Foot	Active travel combined	Active or public transport	Other Method of Travel to Work
Devon	353913	9.4%	1.6%	3.8%	5.4%	1.0%	60.1%	5.0%	2.7%	15.3%	18.0%	23.4%	0.8%
Exeter	57139	4.6%	2.1%	9.2%	11.3%	1.2%	47.5%	5.3%	6.3%	22.9%	29.2%	40.5%	0.5%
Exwick	4853	3.2%	1.6%	10.4%	12.0%	1.9%	55.8%	7.0%	5.4%	14.0%	19.3%	31.3%	0.4%
Priory	4332	3.3%	0.8%	13.3%	14.1%	1.8%	47.5%	6.6%	6.6%	19.4%	25.9%	40.0%	0.5%
Alphington	4670	4.2%	0.9%	7.7%	8.7%	1.0%	53.8%	5.8%	6.8%	19.1%	25.9%	34.5%	0.4%
St James	2578	5.4%	4.0%	6.5%	10.4%	0.5%	27.9%	2.9%	5.7%	45.5%	51.2%	61.6%	0.7%
St David's	3078	5.0%	4.0%	9.7%	13.7%	0.6%	27.5%	3.8%	6.2%	42.2%	48.5%	62.2%	0.5%
Polsloe	3355	4.5%	2.4%	6.9%	9.2%	0.7%	38.5%	4.6%	8.3%	33.5%	41.8%	51.0%	0.3%
Whipton Barton	3543	3.3%	1.0%	10.9%	11.9%	1.5%	54.5%	7.1%	5.6%	15.4%	21.0%	32.9%	0.3%
St Thomas	3706	4.3%	2.1%	10.0%	12.1%	1.2%	44.7%	4.6%	6.9%	25.6%	32.5%	44.5%	0.3%
Newtown	2776	4.5%	2.5%	9.4%	11.9%	0.7%	31.7%	3.4%	7.4%	39.0%	46.4%	58.4%	0.8%
St Loyes	3591	3.7%	3.4%	8.0%	11.4%	1.1%	58.3%	5.9%	4.8%	14.2%	19.0%	30.4%	0.3%
Duryard	1324	7.1%	2.6%	7.1%	9.7%	0.8%	44.8%	5.5%	4.0%	26.7%	30.7%	40.5%	0.5%
Pinhoe	2959	4.0%	2.4%	10.0%	12.3%	1.6%	60.3%	6.0%	4.8%	10.2%	15.0%	27.3%	0.5%
Heavitree	2940	4.8%	1.5%	7.7%	9.1%	1.2%	41.4%	5.0%	7.7%	30.3%	38.0%	47.1%	0.4%
Pennsylvania	2665	6.0%	1.3%	9.4%	10.7%	1.4%	51.4%	5.6%	6.0%	17.8%	23.9%	34.5%	0.6%
Mincinglake	2821	3.1%	1.0%	13.4%	14.4%	1.9%	56.9%	7.4%	5.4%	10.4%	15.7%	30.1%	0.2%
Cowick	2659	3.5%	0.9%	9.5%	10.3%	2.0%	54.2%	5.6%	5.3%	18.2%	23.5%	33.8%	0.4%
St Leonard's	2761	7.9%	1.9%	4.7%	6.6%	0.7%	40.1%	3.0%	8.9%	32.1%	41.0%	47.6%	0.5%
Topsham	2528	9.3%	5.6%	7.9%	13.4%	0.8%	53.0%	3.6%	7.7%	11.4%	19.1%	32.6%	0.6%

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EXETER CITY COUNCIL

SCRUTINY COMMITTEE – ECONOMY

5 SEPTEMBER 2013

EXETER COMMERCIAL PROPERTY REGISTER

1. PURPOSE OF REPORT

1.1 To update members on Exeter City Council's handling of investment and relocation enquiries, and to note the progress made in improving the toolkit available to attract and respond to enquiries.

2. BACKGROUND

2.1 In 1999 Exeter City Council created a basic database of vacant properties and sites for organisations registering an interest to relocate in Exeter, securing new accommodation or investing in the city, replacing a very basic paper based system. In 2002 the Commercial Property Register and enquiries database were converted to enable it to be viewed and browsed online through www.exeter.gov.uk/property. Exeter City Council was the first Council in the country to have an online Commercial Property Register on its website. In 2004 the service was expanded to cover the East Devon, Mid Devon and Teignbridge local authority areas under the banner of the Exeter and Heart of Devon Economic Partnership.

2.2 Exeter City Council provides a Commercial Property Register accessible through www.exeter.gov.uk/property which is an unbiased advice service to businesses looking to relocate or expand their existing business in Exeter and the Heart of Devon. Research into the users of the service confirms that it is seen as a confidential and trusted source of information. Within the Commercial Property Register is a one stop shop with up to date information on not only available vacant properties and sites, saving them time in searching, but also an extensive range of essential data about premises costs, the workforce, education, housing, leisure and transportation access.

2.3 The Commercial Property Register is part of a broader "tool kit" to provide businesses with a bespoke service for those wishing to relocate to, or expand in, Exeter and the Heart of Devon. The key aim is to provide a coordinated and proactive approach for businesses to support and encourage business investment and location in the local economy – a one stop shop approach.

The Economy Unit work very closely with the 'Exeter Commercial Agents Association' and is an active partner in their meetings to discuss the state of the market, future plans and joint working to promote the area for business relocation and investment.

3. COMMERCIAL PROPERTY REGISTER

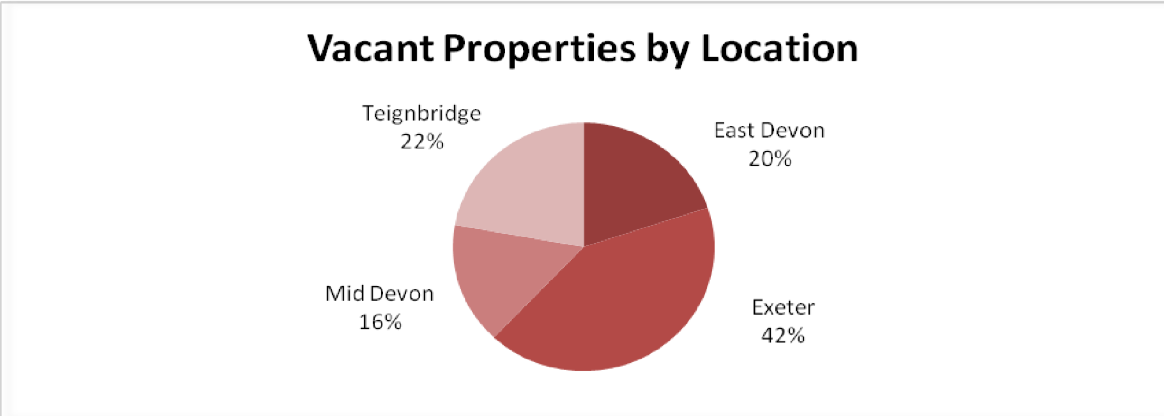
3.1 Over the past ten years the Commercial Property Register has grown from strength to strength with a wide range of commercial agents working with the Council and using the system to provide an additional vehicle to promote vacant properties and with local, regional and national businesses using the system to browse for vacant properties in Exeter and the Heart of Devon.

3.2 Today, 196 commercial agents update the Commercial Property Register, an increase of 11% on the same period last year, with new properties being uploaded on a daily basis. The number of commercial agents using the Commercial Property Register continues to grow as new commercial agents are regularly set up and smaller agents in outlying areas hear about the Commercial Property Register and the service provided by Exeter City Council. A large number of commercial agents are based within Exeter and Devon, 45 and 87 respectively. The remaining commercial property agents (64) are based elsewhere in the country.

3.3 Commercial agents have access to the back office of the Commercial Property Register to upload vacant properties. An email reminder is sent to commercial agents every two months to check properties listed and update as necessary. An information sharing network has been established between the Economy Unit and the commercial property agents based in and around Exeter. This has worked really well in dealing with and providing a rapid response for property related investment enquiries. The number of enquiries passed on by commercial agents to the Economy Unit continues to grow as the relationship with them has been built on trust and confidentiality.

3.4 As of July 2013, there are 790 vacant properties listed on the Commercial Property Register of which, 743 are properties and 47 are sites. This is a 12% increase in vacant properties listed on the Commercial Property Register, compared to the same period last year.

3.5 Of 790 vacant properties listed, the majority are within the local authority district of Exeter:



3.6 Of the 790 vacant properties listed on the Commercial Property Register :

- industrial / warehouse units – 235 (30%)
- offices – 255 (32%)
- retail units – 129 (16%)
- commercial investments – 49 (6%)
- sites / development land – 47 (6%)
- pubs / restaurants / cafés – 39 (5%)
- other types of units (laboratories, etc) – 17 (2%)
- hotels – 10 (1%)
- leisure premises – 9 (1%)

4. RELOCATION ENQUIRIES

4.1 The table in appendix 1 show the number of enquiries received through the Commercial Property Register since 1999. In the 12 months leading up to 31 July 2013, 1118 new relocation enquiries were received by the service, compared to the same period in the previous year when 1,067 enquiries were received, an increase of 4.78%. Exeter is one of the few councils in the South West seeing such a healthy number of relocation and investment enquiries.

4.2 In the previous 12 months the types of businesses searching for vacant properties are:

- Retail – 247 (22%)
- Accommodation & Food Services – 157 (14%)
- Arts, Entertainment, Recreation & Tourism - 123 (11%)
- Property – 89 (8%)
- Business Services – 67 (6%)
- Health – 58 (5%)
- Manufacturing – 55 (5%)
- Construction – 53 (5%)
- Education – 45 (4%)
- Motor Trades – 43 (4%)
- Transport and Storage – 36 (3%)
- Wholesale – 34 (3%)
- Professional Scientific and Technical – 34 (3%)
- Financial and Insurance – 28 (3%)
- Information and Communication – 28 (3%)
- Public Administration and Defence – 11 (1%)
- Utilities Agriculture Forestry Fishing – 10 (<1%)

4.3 The majority of online traffic to the Commercial Property Register is coming from www.exeter.gov.uk/property which shows how popular and important the City Council website is for driving traffic to the Commercial Property Register.

When analysing the Commercial Property Register, we can monitor what type of vacant property someone is searching for, as shown below. Historically, retail has always been the most popular searched for vacant property:

- Retail – 224 (20%)
- Industrial – 212 (19%)
- Office – 157 (14%)
- Pubs / Restaurants / Cafés – 134 (12%)
- Leisure – 112 (10%)
- Other – 101 (9%)
- Land – 67 (6%)
- Investment – 66 (6%)
- Hotels – 45 (4%)

4.4 When we drill down into where a business is located that is looking for a vacant property, the majority are located within Exeter but a significant number are from outside Devon:

- Exeter – 550 (52%)
- Rest of Devon – 68 (6%)
- Rest of the UK – 435 (41%)
- International – 11 (1%)

In the previous 12 months (June 2012 – June 2013) 17 companies were successfully assisted to relocate or remain in Exeter, creating and safeguarding 542 jobs.

4.5 The time taken for enquiries, particularly larger one to come to a conclusion, often takes a long time. The recent most notable example is John Lewis which opened the new store in Exeter December 2011. The Economy Unit along with Planning and other parts of the Council have been working with John Lewis since 1999. An another example, LSL (Your Move) were considering centralising operations to their Southampton office and closing their Exeter office. The Economy Unit worked very closely with the Exeter Manager to find cheaper alternative offices to improve the profitability of his operations in Exeter. This convinced the Board to keep a presence in Exeter, LSL moved to the Forum in August 2012 with 120 staff and a plan to recruit an additional 30 staff.

4.6 The Economy Unit are currently dealing with a number of business relocation enquiries, below is just a sample:

- An aircraft components company looking to build new 7,000 – 10,000sq ft premises in Exeter.

- A London based cloud computing development company are looking to open a UK research and development centre at Exeter Science Park, initially employing 5 and expanding to 20 – 30 staff.

- A product development company are looking for 10,000sq ft of offices in Exeter, employing approximately 50 staff. This enquiry came through a personal recommendation from a well established international business, KPMG.

4.7 As mentioned within this report, the Commercial Property Register is part of a tool kit to promote Exeter and the Heart of Devon as a desirable place for inward investment and business relocation. It is an integral part of an interlinked programme of activities to promote the city and provide effective response mechanisms to interested parties. The main elements are:-

Exeter Promotional video
Executive on 19 March 2013 agreed to fund the development of a promotional video for inward investment purposes. Three S Films, a specialist and well regarding film company were appointed to produce a 2-3 minute video on Exeter and the surrounding area. Over the spring and summer Three S Films have been filming at various locations in and around Exeter and undertaking with key institutions and businesses within Exeter, to include businesses that have recently relocated/opened in Exeter.

The promotional video can be edited for councillors and key staff to use for presentations and when attending conferences and exhibitions to promote Exeter. The video will also be edited for tourism promotion purposes.

The final cut of the promotional video will be available early September 2013 and will also be uploaded onto the following websites www.exeter.gov.uk/property / www.investinexeter.co.uk / www.ExploreExeter.co.uk / www.heartofdevon.com and YouTube.

Exeter Inward Investment Prospectus
To tie in with the launch of the video the Economy Unit is producing a new promotional prospectus. The prospectus will be designed in a folder format to ensure it is in flexible in its content showcasing Exeter for inward investment and will be used for relocation enquiries, distribution where appropriate at conferences and exhibitions and to key industry leaders and journalists.

Website

Within these promotional tools, the new promotional website: www.investinexeter.co.uk will be the main call to action, where there will be prominent links to the Exeter and the Heart of Devon Commercial Property Register. This new website sits within the Council's website, but having its own URL address. The site is now up and running and having new content added daily.

5. THE FUTURE OF THE COMMERCIAL PROPERTY REGISTER

5.1 The current system does not provide a satisfactory analytical capability of producing reports on searches undertaken. At the beginning of 2013 the Economy Unit evaluated the software and compared it to other software packages available. It was decided to redesign the system in-house before the end of the contract with the current supplier in March 2014.

5.2 The Senior Economy & Tourism Officer is working closely with the City Council's IT Services team to rebuild the previous system and adding essential new features to it. During the build process of the new in-house system, IT Services are evaluating how to ensure that the Commercial Property Register can be marketed to other councils to purchase. A number of councils within the South West have already expressed an interest in purchasing the Commercial Property Register software from the City Council.

6. RESOURCE IMPLICATIONS

6.1 The Senior Economy & Tourism Officer will manage the transition from the existing software system to the new and updated in-house system. As mentioned previously, there is the potential for the City Council to commercially sell the new and updated in-house Commercial Property Register and the new system is being developed with this in mind.

7. RECOMMENDATION

7.1 Members note the report and progress made with the Commercial Property Register and the City Council's role in dealing with investment and relocation enquiries.

7.2 Members note the progress made in improving the toolkit available to staff for dealing with inward investment / relocation enquiries; in the form of the promotional video, the www.investinexeter.co.uk website and the prospectus.

Victoria Hatfield
Economy & Tourism Manager

Maureen Gori de Murden
Senior Economy & Tourism Officer

Local Government (Access to Information) Act 1985 (as amended)
Background papers in compiling this report:-

None

APPENDIX 1

Table: Number of enquiries through the Commercial Property Register

Month	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Jan	2	12	9	34	54	52	88	118	148	146	76	86	44	120	79
Feb	6	14	27	38	38	54	84	112	137	116	72	74	75	191	121
Mar	6	18	32	27	39	64	97	111	147	120	72	88	97	159	80
Apr	9	10	29	36	40	53	84	91	121	125	74	73	49	87	116
May	8	16	16	33	53	38	66	139	125	69	71	59	47	98	120
Jun	12	15	29	22	50	42	75	78	121	81	61	62	74	43	85
Jul	12	17	23	18	44	67	83	90	129	73	59	73	44	59	113
Aug	17	17	20	23	39	46	96	131	108	74	53	71	39	83	
Sep	12	16	25	33	34	99	114	119	112	75	59	75	55	59	
Oct	9	24	38	36	50	82	97	100	116	75	69	72	66	117	
Nov	20	20	34	23	38	99	95	126	112	75	69	75	***61**	99	
Dec	9	9	11	19	32	64	83	74	80	39	41	39	89	46	
Total	**122**	**188**	**293**	**342**	**511**	**760**	**1062**	**1289**	**1456**	**1068**	**776**	**847**	**740**	**1161**	**714**
Average number of enquiries per month	*10*	*16*	*24*	*29*	*43*	*63*	*89*	*107*	*121*	*89*	*65*	*71*	*62*	*97*	*102*

* Indicates Exeter Commercial Property Register was offline, 14 – 30 November 2011

EXETER CITY COUNCIL

SCRUTINY COMMITTEE - ECONOMY

5 SEPTEMBER 2013

RAMM'S VISITOR RESEARCH PROGRAMME 2013-14

1. PURPOSE OF THE REPORT

1.1 To inform Members of the visitor research programme and for the forthcoming plans to be noted.

2. INTRODUCTION

2.1 RAMM has a strong track record in collecting information about visitors, their behaviour, attitudes and opinions. This activity helps the museum to listen to visitors and change where necessary. It also provides important evidence for funders, partners, applications and award submissions. The other reason for collecting this data is to understand RAMM's contribution to the vibrancy of the city's offer and its role in creating the quality of life that is one of Exeter's distinguishing characteristics.

2.2 Two tranches of research have been undertaken since RAMM reopened in 2011, the first December 2011 to January 2012 (funded by the Heritage Lottery Fund) and the second in August and October 2012 (funded by Arts Council England). This work forms part of a research plan to 2014.

3 BACKGROUND

3.1 Since reopening in December 2011 the visitor research has been designed to capture visitor views regarding their experience of and reactions to the newly-refurbished museum.

3.2 Most visitor information is collected through an exit survey, a questionnaire that can be self completed or facilitated by a researcher interview. It is designed to take no more than five minutes to complete. It consists of two question types – Classification (eg age, gender, employment status, residents or visitors, etc) and Views on RAMM – capturing views, rating a number of key service and operational aspects, and measuring satisfaction. The sample size is large enough (800) to have confidence in the robustness of the data.

3.3 RAMM also uses Acorn Segmentation, a tool widely used in the commercial world. This compares visitor information to local population data. It allows RAMM to identify areas of potential growth and to compare the socio-economic profile of museum visitors to that of the base population.

3.4 The collection, analysis and reporting on data 2012-14 is funded by Arts Council England through its Major Partner Museums programme which runs until March 2015

4 KEY FINDINGS FROM RESEARCH DECEMBER 2011 TO OCTOBER 2012

4.1 Views on RAMM

- Satisfaction levels are high with 96% rating their overall satisfaction as good, very good or excellent.
- Eight out of ten people said they would be likely to visit again which suggests visitor numbers should remain high.
- Nearly one in nine would recommend a visit to friends and family.
- 75% said their visit was better or much better than expected.
- The top three ways to describe RAMM are educational, family friendly and high quality.
- 94% agreed that RAMM makes a vital contribution the life of Exeter and the region and 89% said they were proud of that.
- Half of RAMM's visitors say the most effective way to promote to them is via the website. High Street posters (38%) and press advertising (33%) scored highly too.

4.2 Classification

The breakdown of visitors to the museum confirms significant changes to the origin and time spent in RAMM by visitors compared with those who visited before its refurbishment.

- 62% of visitors to RAMM live in Devon with 38% from the rest of the UK and abroad; a higher proportion were from Exeter and Devon prior to the development.
- RAMM has more female visitors (62%) than male.
- Nearly three quarters of the visitors are employed (full or part time) or retired.
- 49% of respondents had not visited before showing RAMM has been successful in attracting new visitors since its refurbishment.
- Over half of the visitors to RAMM spend between one and two hours in the museum, while nearly a third spend between two and four hours. This compares with an average of 41 minutes measured before RAMM closed for redevelopment. Increasing this measure, which is a key indicator of the quality of the visitor experience, was a performance measure agreed with the Heritage Lottery Fund for the museum's development project.
- In socio-economic terms RAMM's profile almost exactly matches that of the Devon population. This finding is unusual for museums and is a result of the planned audience development undertaken by the museum.

4.3 A cautious view has been taken of the spend generated by visitors to RAMM between April 2012 and March 2013. Based on information gained from those who indicated that RAMM was the main reason for their visit to the city, and based on an average of £14.55 being spent per visit by locals and £40.95 by non-local visitors, it is estimated that a total spend of £3.35 million was generated into the city's economy.

5 PROGRAMME 2013-14

5.1 RAMM will carry out two visitor surveys in each of 2013 and 2014 building on the data collected in 2011 and 2012 to benchmark performance from year to year and identify trends and attitudes for the service to respond to. Information from these surveys will also be used to compare visitor's socio-economic profile with local population data.

5.2 It is necessary for benchmarking purposes to be consistent in a proportion of the data gathered and important that interviews/questionnaires are not too long. However there is scope for developing the research to explore some different aspects of a visit to RAMM.

5.3 For 2013 the Classification questions of the questionnaire will remain broadly the same and continue to record information about visitors. The Views on RAMM questions have been amended to include two new areas. Questions will explore attitudes and behaviour related to donating and spending.

5.4 There will be a further opportunity to develop the questionnaire for 2014 to explore other key areas where information and attitudes would be useful in service planning.

6. CONCLUSION

6.1 The programme to date has provided valuable data about visitors to RAMM and their reactions to the newly-refurbished museum. Developing the research to include new areas, such as attitudes and behaviour to donating and spending money, will provide RAMM with further insight into important areas it wishes to develop.

7. RECOMMENDED

i) Members are invited to comment on the report and to note the positive impact of RAMM in attracting visitors and their expenditure to the city.

Camilla Hampshire
Museums Manager and Cultural Lead

ECONOMY DIRECTORATE

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

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SCRUTINY (ECONOMY)
MEMBERS' SUGGESTIONS FOLLOWING THE SCRUTINY WORK PROGRAMME MEETING
(JULY 2013)

High Priority Issues:-

- Training, Education, Skills and Employability – how is Exeter performing?
- District Heating – Low Carbon Agenda.
- City Centre Strategy – Empty shops strategy and "pop up" shops.
- Marketing Exeter – business investment and tourism.
- Social Economy Strategy.

Medium Priority Issues:-

- Future of Exeter Quay.

Low Priority Issues:-

None identified.

RAMM Storage to be placed with Scrutiny Economy from Scrutiny Community.

Parkwood Contract to be placed with Scrutiny Economy from Scrutiny Community.

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Parkwood Leisure Working Group

Terms of Reference

Name of the Group:	Parkwood Leisure Working Group
Membership:	The Working Party will consist of the following: • Chair of the Scrutiny Committee - Economy • Portfolio Holder for Economy and Culture • Representative from each Political Party • Events Facilities and Markets Manager • Leisure Facilities Manager • Representatives from Parkwood Leisure
Frequency of Meetings:	Monthly
Reporting Mechanism:	To report to the Scrutiny Committee
Function of the Group:	To work with Parkwood Leisure to develop its service and enhance its facilities achieving a level of service for customers well above the contractual baseline.To monitor contractual issues, monitoring customer comments and relevant action taken and agreeing improvement initiatives.

Updated August 2013

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

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