SCRUTINY COMMITTEE - ECONOMY

Date: Thursday 3 March 2016
Time: 5.30 pm
Venue: Rennes Room, Civic Centre, Paris Street, Exeter

Members are invited to attend the above meeting to consider the items of business.

If you have an enquiry regarding any items on this agenda, please contact Sharon Sissons, Democratic Services Officer (Committees) on 01392 265115 or email sharon.sissons@exeter.gov.uk

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

Membership -
Councillors Brimble (Chair), Lyons (Deputy Chair), Branston, Brock, Bull, Crew, Harvey, Henson, Prowse, Robson, Vizard, Wardle and Williams

Agenda

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 21 January 2016.

3 **Declarations of Interest**

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

4 **Local Government (Access to Information) Act 1985 - Exclusion of Press and Public**

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

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

5 **Questions from the Public Under Standing Order 19**

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

6 **Questions from Members of the Council Under Standing Order 20**

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

PRESENTATION TO COMMITTEE

7 **Exeter CAB Presentation - Economic Well Being Survey**

To receive a presentation from Steve Barriball who will attend to provide an update following the further Economic Well-Being Survey.

8 **Update on the Exeter Flood Defence Scheme**

Richard Cox, Project Manager, Environment Agency will attend and provide an update on the Exeter Flood Defence Scheme.

9 **Update on the Waterways Strategy**

To receive a verbal update from the Assistant Director Public Realm.

MATTERS FOR CONSIDERATION BY THE EXECUTIVE

10 **Parking Strategy 2016 - 2026**

To consider the report of the Assistant Director Public Realm. (Pages 5 - 66)

11 **South Street/Corn Exchange Regeneration Proposals**

To consider the report of the Corporate Property Manager. (Pages 67 - 68)

MATTERS FOR DISCUSSION

12 **Budget Monitoring report to 31 December 2015**

To consider the report of the Assistant Director Finance. (Pages 69 - 80)

MATTERS FOR INFORMATION

13 **Radio 1 Big Weekend Update**

To receive a verbal update from the City Council's Arts and Events Manager.

14 **Performance Review - The Matford Centre**

To consider the report of the Markets, Events and Facilities Manager. (Pages 81 - 86)

15 **Performance Review - Corn Exchange**

To consider the report of the Markets, Events and Facilities Manager. (Pages 87 - 92)

16 **Legacy Leisure Contract Working Group Minutes**

To consider the report of the meeting held on 9 February 2016. (Pages 93 - 98)

17 **Exeter Highways and Traffic Order Minutes**

To receive the minutes of the Exeter Highways and Traffic Orders (HATOC) meeting held on 11 January 2016. (Pages 99 - 102)

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.

Individual reports on this agenda can be produced in large print on request to Democratic Services (Committees) on 01392 265107.

Find out more about Exeter City Council by looking at our website 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 265107 for further information. **Follow us:www.twitter.com/ExeterCouncil**

REPORT TO SCRUTINY COMMITTEE ECONOMY AND EXECUTIVE COMMITTEE
Date of Meetings: 3 March and 15 March 2016
Report of: Assistant Director Public Realm
Title: Parking Strategy 2016 - 2026

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1. To seek adoption of the new Parking Strategy

2. Recommendations:

2.1. That the Parking Strategy 2016 – 2026 is adopted and that work commences towards the delivery of the actions set out in the Strategy's Action Plan.

3. Reasons for the recommendation:

3.1. To adopt the Parking Strategy 2016 – 2026 as a new strategic approach to the parking services provided by the council, with a focus on four key objectives of economic growth, parking capacity, congestion and parking income.

4. What are the resource implications including non financial resources.

4.1. The Parking Strategy itself commits the Council only to an agreed strategic approach to the provision of parking services in the future. All proposed changes to current operational practice, such as tariff changes, signage and physical improvements, will be brought to members for a separate decision which will set out any financial implications.

4.2. In order to deliver the strategic objectives, particularly in terms of driving economic growth, it is essential that appropriate funding is available for on-going maintenance, refurbishment and renewal programmes. A Condition Survey will be undertaken from within existing budgets and the physical improvements identified in the survey will be prioritised into a long term programme of investment into the city's car parks. Where additional on-going or one-off funding is required, a bid will be made to ensure that funding is available to deliver the investment programme.

4.3. The Action Plan sets out the proposed interventions and a timetable for their delivery.

5. Section 151 Officer comments:

5.1. There are no immediate financial implications contained within this report. When a programme of enhancements is presented to Members the financial implications will also be considered.

6. What are the legal aspects?

6.1. None identified for the adoption of this Strategy.

7. Monitoring Officer's comments:

7.1. None identified.

8. Background to the Strategy

8.1. A new strategic approach to parking in the City Centre is required to continue to support a successful economy, given the rapidly changing shopping and leisure demand patterns, and to ensure that car parking capacity is enough to meet future demand.

8.2. Consultants were appointed in August 2014 following a tender process to review and produce a strategy for off-street parking. This included qualitative, operational and capacity reviews of the car parks as well as workshops with key stakeholders and car park users. The completed version of the consultants' report was received in October 2015.

8.3. Three Member Spotlight Reviews have taken place to discuss the consultants' findings and contribute to the final Strategy.

8.4. The Strategy seeks to deliver four Strategic Objectives:

- **Economic Growth:** Car parking is an important element of Exeter's growth story and it is essential to ensure that the City Council's car parks support economic growth by encouraging visitors to the city and to stay longer when they visit;
- **Maximising Capacity:** projections show that actual capacity in Exeter's city centre car parks will be reached on a Saturday by 2018 without strategic intervention;
- **Reducing Congestion:** Traffic congestion is seen as a key deterrent to accessing the City Centre;
- **Maintaining Income:** The City Council depends on the £6M income it receives from its car parks service every year to deliver a balanced budget and provide essential services.

8.5. Clearly, these Strategic Objectives will conflict from time to time and it will not always be possible to make interventions that meet all four Objectives. Decisions on the specific interventions set out in the Action Plan will need to take into account the impact on each and balance them in the best way possible.

8.6. The Strategy considers for Exeter and Topsham the current and projected future position on the demand for and supply of parking, parking operations and tariffs, the condition of the City Council's car parks and their potential for improvement and development, as well as signage and other infrastructure that influences parking behaviour. It considered the issues in the light of the Strategic Objectives and makes recommendations for interventions that are set out in the Action Plan.

9. Key Issues in the Strategy

9.1. Stakeholder issues

- Reducing congestion would increase demand from suppressed trips
- Strong support for enhanced and additional Park and Ride services
- Poor directional and live capacity information about car parks
- Limited payment options in some car parks

- Hard to find a space at peak times

9.2. Parking Supply and Demand issues

- Saturday City Centre car parking will run out of capacity in 2018
- Most city centre parking is short stay use
- Weekday capacity is around 60%
- Only 23% of weekday parking is commuter parking
- Demand for evening parking is predicted to increase

9.3. Parking Operations issues

- Exeter's long stay parking charges are significantly cheaper than comparable cities for shorter stays
- Exeter's parking charges do not discourage short stay users from using long stay car parks
- There are no short stay restrictions at long stay car parks or vice versa
- Unlike Exeter, most comparable cities charge for evening parking
- Parking demand is only marginally affected even with extreme increases in prices
- There is low demand for season tickets
- The current permit schemes do not maximise capacity in underused car parks

9.4. Car Park Condition and Development issues

- Not all Premium car parks score highly in terms of quality
- The maximum use of Cathedral and Quay lags behind other car parks, suggesting that it is used as a final choice car park.
- City centre congestion could be ameliorated by investment in King William Street, Cathedral and Quay, Mary Arches Street and Harlequins car parks
- Triangle car park offers a prime location for a high quality multi-storey.

9.5. Car Park Signage and influencing infrastructure issues

- Improved signage is needed to help visitors navigate to and around the City Centre car parks
- the current signage and information around Princesshay needs to be reviewed
- real-time information on parking space availability, Park and Ride and journey times into the city centre needs to be improved and developed

9.6. The Strategy analyses how interventions on pricing and tariffs, evening opening, season tickets and permits, physical improvements, signage, supply, alternatives to city centre parking and parking promotions could deliver the Strategic Objectives and sets out its recommendations in an Action Plan.

9.7. The Action Plan seeks to deliver a revised pricing and tariff structure for the City Council's car parks in September 2016, an Investment Strategy for the City Council's car parks in November 2016 and improved signage and payment options by September 2017, amongst other things. Key components of the Strategy will be brought forward for public consultation and Member consideration in due course.

10. How does the decision contribute to the Council's Corporate Plan?

10.1. A Corporate Plan priority in 2015/16 is to "*Adopt a new Parking Strategy and develop the Parking Action Plan".*

11. What risks are there and how can they be reduced?

11.1. There is a risk of loss of income from multi-storey car parks if structural issues are found to exist, as is common with that form of construction. A structural survey, with an associated investment programme, will be undertaken as soon as possible to ensure this critical income stream is maintained.

12. What is the impact of the decision on equality and diversity; health and wellbeing; safeguarding children, young people and vulnerable adults, community safety and the environment?

12.1. The Equalities Impact Assessment reveals no anticipated negative impacts. There may be positive impacts for disabled drivers if accessibility to the city centre is improved through the aim to reduce congestion. There may also be positive impacts on female drivers if car parks become more welcoming and perceptions of safety are improved and provision of wider parent & child bays is reviewed.

13. Are there any other options?

13.1. Not applicable.

Sarah Ward
Assistant Director Public Realm

<u>Local Government (Access to Information) Act 1972 (as amended)</u>
Background papers used in compiling this report:-

Exeter Parking Strategy Final Strategy Report, January 2016 WSP | Parsons Brinckerhoff

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Democratic Services (Committees)
Room 2.3
01392 265275

Exeter
City Council

A New Strategy for Parking 2016 - 2026

March 2016

Public Realm, Exeter City Council
This document is also available from our website at www.exeter.gov.uk

Any enquiries regarding this document should be
sent to us at publicrealm@exeter.gov.uk

If you would like this information in another language or format such as large print or Braille, please phone 01392 277888 or e-mail *customer.services@exeter.gov.uk*.

Contents

Foreword

By Cllr Rosie Denham, Portfolio Holder for Economy and Culture

“Exeter has ambitious plans to become the Regional Capital of the South West, placing a vibrant, successful City Centre at the heart of these plans. How people access the City Centre, their first impressions, where and how long they park for and how safe they feel are important elements of the City’s success. The city’s car parks and transport infrastructure contribute to the city’s economic growth, delivering ease of access into the City Centre, encouraging people to stay longer and helping to support the development of the city’s evening and night-time economy, further strengthening the cultural vibrancy of the City Centre. ”

CLLR ROSIE DENHAM
Portfolio Holder for Economy and Culture, Exeter City Council
March 2016

Executive Summary

Exeter City Council has an extensive portfolio of car parks in the City Centre and in key local retail centres. The Council is keen to see its car parks contributing to the economic growth of Exeter and to optimise existing parking capacity in the city and reduce congestion whilst maintaining an important income stream.

WSP Parsons Brinckerhoff were commissioned by Exeter City Council in August 2014 to provide professional consulting advice and services for its City wide review of off-street parking. This included qualitative, operational and capacity reviews of the car park and tariff modelling as well as perceptual assessments from stakeholder and car park user workshops.

The Strategy considers for Exeter and Topsham the current and projected future position on the demand for and supply of parking, parking operations and tariffs, the condition of the City Council's car parks and their potential for improvement.

Stakeholders highlighted that it was hard to find a parking space at peak times, that there was poor directional and live capacity information about the city's car parks and that payment options were limited. They were particularly concerned about congestion and there was strong support for more Park and Ride Services.

A key issue to be addressed by the Strategy is parking capacity in the City Centre on Saturdays, which is predicted to reach full capacity by 2018. Weekday capacity is around 60%, with only 23% of this being commuter parking and the rest mainly short-stay use. Demand for evening parking is predicted to increase.

In terms of parking charges, there is an anomaly between Exeter's long stay and short stay parking offers. There are no short stay restrictions in the long stay car parks and nor do the charges discourage short stay users from using long stay car parks: charges are cheaper in long stay for the same amount of parking time. This makes Exeter significantly cheaper than comparable cities for shorter stays. In addition, Exeter is unlike most comparable cities in not charging for evening parking.

The City Council's car parks vary considerably in their condition, look and feel, which influences where people prefer to park and adds to congestion. Not all the Premium car parks score highly in terms of quality and the use of Cathedral and Quay car park suggests that it is a last choice for most drivers. There is scope for limited development on some existing car parks which may increase the number of spaces overall and Triangle Car Park offers a prime location for a new high-quality multi-storey.

Improved signage is needed to help visitors navigate to and around the City Centre car parks and in particular the area around Princesshay. Real time information on parking space availability, Park and Ride bus times and journey times into the City Centre needs to be improved.

The Council will look to make changes to the current pricing and tariff structure, signage, evening offer, opening times and charges, improve the condition and look and feel of its car parks, seek to increase the number of parking spaces, work with restaurants and retailers on joint promotions and support the County Council to encourage alternative forms of travel.

The Action Plan on Page 54 sets out the proposed timescale and priority for these interventions. The impact of the Strategy will be measured in terms of increased dwell time, increased Sunday parking demand and modal shift. Other more operational measures will also be monitored.

Policy Context

NATIONAL PARKING POLICY

The Government's National Planning Policy Framework was published in March 2012 and set out the Government's planning policies for England and how these are expected to be applied. This advice supersedes the more definitive advice within former Planning Policy Guidance (PPG) notes and Planning Policy Statements (PPS) including PPS3 Housing; PPG6 Town Centres and Retail Development and PPG13 Transport.

The National Planning Policy Framework sets out a series of parking related objectives to:

- Reduce the dependency on the car in favour of more sustainable forms of transport;
- Set local parking standards that reflect local conditions and transport objectives;
- Improve the quality of parking in town [and City] centres and set appropriate parking charges so as to support the vitality of the town [and City] centre.

LOCAL PARKING POLICY

Many policies relating to Planning and Transportation are relevant to Local Parking Policy. The future development of the City and its wider environs, its economy, including evening economy, tourism and its Vision including Principle 9 to improve sustainable travel, have been reviewed in the context of the Parking Strategy.

Local Parking Policy has the challenging aim to balance the needs of a thriving City (for commuters, tourists, shopping, education and leisure trips, including the evening economy), with a supply of parking that is affordable for those where the alternative travel options are limited and not convenient, whilst fitting into policies that encourage sustainable travel, and operating at least at cost neutral status, and more ideally as a revenue resource for the Council.

Single occupancy car travel is one of the least sustainable ways of travel in terms of energy and utilisation of highway space per person, but cannot currently be influenced by parking operation other than through the tariff where the car rather than the occupant is the basis of charge. Car travel, as for other vehicles, detrimentally contributes to air quality issues, which is influenced by particulates emitted from diesel engines and congestion, as well as other factors such as topography and air flow.

Exeter City Council is seeking growth that will support a sustainable Central Area and to protect its special character by helping tackle associated issues that impact on quality of life such as air quality. The Council supports the Local Transport Plan 3 (LTP3) Objective 6 of seeking to achieve a step change in public transport to reduce travel demand by car, and also measures which might minimise the need to travel. However, not all Core Strategy growth in demand can be accommodated by sustainable transport and trip reduction alone, so car parking will retain an important role in providing good access to the Central Area which is seen as crucial to the future prosperity of Exeter.

The Core Strategy seeks strategies to encourage reduced car reliance and suggests parallel action to reduce the relative attractiveness of car use.

Improving bus services and supporting 'Park and Ride' expansion are set out in policy documents, with four possible new 'Park and Ride' (P&R) sites identified to serve the West, East and North; and South West in addition to the current three sites to the East, South East, and South. The role of P&R is aimed at longer stay car parking, reducing the car element of commuter and day trips into and out of the Central Area at the most congested times.

Encouraging diversification of development within the Central Area through the Core Strategy should nurture more self-contained, shorter journeys which are likely to be made by foot or bicycle as the distances are small and car use would be less attractive.

PLANNED DEVELOPMENT AND GROWTH ASSUMPTIONS

The growth assumptions in this Strategy have been informed by the adopted Exeter City Council Core Strategy (February 2012); the emerging Exeter City Council Draft Development Delivery Options Document (Consultation Version, December 2013) and discussions with Exeter City Council officers for key developments as well as predicted visitor numbers and tourism trends.

CORE STRATEGY AND STRATEGIC HOUSING LAND AVAILABILITY ASSESSMENT

The Core Strategy quantifies growth expectations, including broad locations where that growth is anticipated (e.g. Central Area, Urban Extensions etc.). The Strategy does not identify specific sites or how the growth will be delivered. This will be set out within the Development Delivery Plan which is yet to be adopted although a draft was published for public consultation and representations during December 2013 and a Publication version was published for comment in July 2015 but has not yet been submitted to the Secretary of State for Examination.

In parallel with the Core Strategy, the Council has responsibility for housing delivery to meet future need, and it reviews and monitors growth in housing via the Strategic Housing Land Availability Assessment (SHLAA) and Authority Monitoring Reports (AMR), published annually and setting out completions to date and expectations for the future trajectory of growth.

Any growth is important, since it could drive an increase in car parking demand, as follows:

- Increases in the retail, leisure and tourist draw (through an expansion in destination land uses)

can be expected to increase the attractiveness of the Central Area as a destination;
- Increases in office land uses within the Central Area may also increase demand for car parking;
- A rise in the catchment population within reasonable drive time of Exeter is likely to help drive increases in demand to travel to the Central Area (subject to the growth in destinations/ attractiveness there).

This is likely to have a distance decay function and depend on the degree of competing non-residential development elsewhere to the Central Area. For example, residential growth in urban extensions on the edge of Exeter and within ECC's administrative area and within urban extensions and new communities on the city fringes can be expected to have a much greater and more significant impact on demand than growth further afield within Devon or beyond (e.g. major planned housing growth in Newton Abbot).

POTENTIAL CONSTRAINTS TO FUTURE GROWTH IN CAR PARK USE

Whilst the above may be seen as potential drivers of additional demand in terms of land use and attraction of the Central Area, it is also recognised that car parking forms only one part of the transport system (and ECC and NCP off-street car parks only one component of the car parking stock with the significant capacity of on-street and Private Non-Residential parking as well as residential parking further out from the Central Area). Growth in demand may well, in reality, be constrained or tempered by the following:

- Heavy congestion on arterial routes into the Central Area, particularly at peak times, but also during other parts of the day. This may discourage some from driving to the Central Area, particularly if LTP planned and promoted alternatives to driving are delivered and on balance are sufficiently attractive and able to compete in terms of cost, time and convenience (e.g. metro rail improvements, cycle route improvements, possible P&R expansion). Alternatively, there is a risk that, contrary to ECC's Strategy of focussing major trip attractors within the Central Area, if competing edge or out of town growth comes forward that people may choose this over the Central Area for some purposes
- Work to date suggests that in reality, at the time of the 2010 Car Parking Study undertaken by WSP Ltd for Exeter City Council, ECC car parks may have a relatively limited role in providing long stay car parking for commuters at present (with the exception of P&R), as a result of relatively high long stay charges, some remaining free on-street parking opportunities in surrounding areas and the availability of Private Non-Residential (PNR) car parking. The third LTP (2011) published by DCC estimates around 3,000 PNR parking spaces within the Central Area, which is slightly more than half the number of publicly available off-street parking available via ECC and NCP car parks and therefore expected to contribute to congestion (especially peak hour congestion) more than the ECC spaces which show much higher demand / accumulation during the middle of the day, as compared to the highway peak arrival and departure times
- It must be recognised, of course, that any future B1 office development within the Central

Area may come forward with greater restraint on new car parking provision than was historically the case and therefore such development may be more reliant in future on public transport and/or public car parking than for past developments.

- The travel to work area is expanding, with more people travelling further distances to work in Exeter. The opening of the South Devon link road is expected to increase this number.

GROWTH TRAJECTORY

Table 1 Core Strategy Housing and Population Growth Trajectory

Year	Estimated population growth (in year)	Estimated population growth (cumulative)	Estimated population total*	Annual housing completion (in year)* - SHLAA	Cumulated housing forecast – SHLAA
2013/14	-	-	120,905	-	-
2014/15	1875	1875	122,779	783	783
2015/16	1544	3419	124,324	645	1428
2016/17	1669	3213	125,993	697	2125
2017/18	1954	3623	127,946	816	2941
2018/19	1540	3493	129,486	643	3584
2019/20	2174	3714	131,660	908	4492
2020/21	2023	4197	133,683	845	5337
2021/22	1379	3402	135,062	576	5913
2021/23	1027	2406	136,089	429	6342
2023/24	845	1872	136,935	353	6695
2024/25	1300	2145	138,235	543	7238
2025/26	1822	3122	140,057	761	7999

* Based on extrapolating from 2011 Census data of 117,773 residents, assuming an average of 2.3943 residents per dwelling and based on housing completions and forecast completions from the 2013 Revised SHLAA (Appendix 4).

Table 1 above shows the Housing and Population Growth Trajectory based on the Core Strategy which suggests a population increase of 19,000 or 16% from 2014 to 2026. Whilst detailed SHLAA data has not been consulted for Teignbridge or East Devon the following broad build-out profiles for the period 2014 to 2026 could be assumed approximately 450 dwellings per annum at Cranbrook from 2014 to 2026 (total 5,400 dwellings); and approximately 250 dwellings per annum at South West Exeter from 2016 to 2026 (total 2,500 dwellings).

KNOWN AND ANTICIPATED CITY CENTRE DEVELOPMENTS

Recent and current City Centre development includes the John Lewis extension of floor-space (2012), a Premier Inn at Southernhay and the Guildhall replacement of retail area for restaurant use (2015/16).

The anticipated development includes the Bus Station re-development with the swimming pool and leisure proposals as part of the Bus Station re-development reviewed below; and the Bus Depot re-development, which is a site adjacent to the bus station. Planning permission has been granted for the Bus Station site subject to a planning obligation, so for the purposes of the Strategy this has been included in the technical calculations that support the Strategy predictions.

RE-DEVELOPMENT OF EXETER BUS STATION

For the purposes of the analysis that underpins the technical advice to the Strategy, the re-Development of the Bus Station has been included within the development proposals. This re-development will be an important Central Area development. The Council has resolved to grant planning permission subject to a planning obligation, and it is understood that with an anticipated opening year of 2018.

There are net changes in land use, car parking supply and demand and alterations to routing within the City Centre affecting routes to different car parks from some areas. The re-development will close Bamfylde Street Car Park (88 spaces) as well as 90m of on street parking and remove on street parking on Bude Street and Belgrave Road. The Coach parking will be re-located from the bus station and the National Express intercity buses will move from their existing bays in the bus station to on-street in Bampfylde Street with a further loss of on-street parking. In addition to the parking which will relocate to other areas, the development itself increases the demand for parking as a result of the net increase in development land uses.

The closure of Bampfylde Street car park and existing development uses is assumed to happen with anticipated construction start date of 2016, with the new businesses open in 2018.

Paris Street (which is part of the B3183), will be closed to traffic at its northern end, no longer providing vehicular access to Sidwell Street and the High Street. The Street will effectively end at the access to the Princesshay car parks at Southernhay.

As a result of the closure of Bampfylde Street car park, twinned with the closure of Paris Street, the traffic that currently enters and exits Bampfylde Street Car Park from the north and west (York Road) will most likely divert into John Lewis Car Park, and traffic from the north and east Blackboy Road/Old Tiverton Road) will most likely divert to the Triangle Car Park. Traffic from the east (Heavitree Road) and south (Western Way) could use the Princesshay Car Parks or other car parks on route such as Magdalen Road or Triangle. The capacity analysis later in this document shows that there is some limited capacity in most of these car parks to absorb the impact of the closure of Bampfylde Street Car Park.

The closure of Paris Street as a through route will make the three Princesshay car parks less easy to access from the North and West, and John Lewis, King William Street and Howell Road less easy to access from the South.

SUSTAINABLE CITY CENTRE / HEALTHY LIVING / PRINCIPLE 9 / AIR QUALITY

The Sustainable City, Healthy Living and Principle 9 (of Exeter's Vision Partnership) relate to the City becoming a beacon for healthy living through encouraging more pedestrian, cycle and public transport use as part of the solution to travel. Principle 9 seeks further pedestrianisation of the central area, and removal of cross City traffic to make the central area more attractive to visitors. Use of sustainable modes of travel will in turn help to improve the air quality by reducing traffic in the City Centre.

Exeter City Council, along with other organisations represented on the Exeter and Heart of Devon Low Carbon Task Force, recognises the benefits of electric vehicles in reducing harmful emissions and improving local air quality. It has adopted an Electric Vehicle Strategy, to encourage the use and ownership of electric vehicles as one element of a sustainable transport package. Exeter City Council has already installed charging points for electric vehicles in a number of its car parks and a programme of installation of solar panels and LCD lighting in its car parks was completed in December 2015.

Where possible, opportunities to include actions to help reduce carbon emissions from vehicles travelling to and from the ECC car parks and/or in terms of operation of the car parks themselves, will be considered particularly where this generates cost savings and/or can be incorporated in a cost effective manner.

TOURISM AND VISITORS

Exeter City Council's Economy and Tourism Manager has provided the latest available data on visitor arrivals and spend for Exeter. Information on visitor trips to Exeter (referenced within the Exeter Visitor Strategy from data obtained from Cambridge Economic Impact Assessment) shows that in 2014 there were 1.6M day visitors; 0.45M overnight visitors, with the vast majority (75%) on holiday, or (14%) visiting friends or family, with 7% business trips and 4% to study.

The visitor spend is estimated to be £181M per annum: 27% on shopping, the same on food and drink; 22% on accommodation; 13% on travel and 11% on visiting attractions and entertainment.

The trend in visitor growth fluctuates but on average suggests 0.9% growth per annum which has been applied to the modelling and analysis that underpins the Strategy.

Strategic Objectives

- **ECONOMIC GROWTH**

  Exeter has ambitious plans for economic growth over the next 20 years. The City's vision is "*To establish the Exeter city-region as one of the UK's leading knowledge economies, attracting significant investment, creating sustainable high quality employment and raising income levels for the benefit of its residents and businesses.*"

  Exeter is a motor for job creation. In the 10 years to 2014 the number of people employed in Exeter rose by nearly 30,000 (34%) and inward commuters now make up around 35% of all employees in Exeter. Over the next 15 years, productivity per job in Exeter (26%) is expected to rise almost three times as fast as the rise across the LEP Heart of the South West area (9%). Exeter seeks to compete as an office location, particularly given the role of office staff in generating lunchtime and early evening trade and enlivening the streets, cafes and shops of the City Centre;

  Retail growth is key to the success of our thriving city and Exeter is already the premier shopping destination in the peninsula. The City has ambitions to create an '18 hour' City by extending the City's evening economy and leisure offering.

  Competition from out of town shopping centres remains a threat and Exeter is working hard to become a destination of choice, combining a superb retail offer with a strong heritage, culture and leisure offer. Car parking is an important element of this growth story and it is essential to ensure that the City Council's car parks support economic growth by encouraging visitors to stay longer when they visit the city.

- **MAXIMISING CAPACITY**

  The existing use of the off-street car parks is markedly different between weekday, Saturday and Sunday. On Saturdays, the car parks are close to full capacity with the maximum overall use at 88%, and nine of the 24 central car parks at or over capacity. Critically, projections show that actual capacity in Exeter's city centre car parks will be reached on a Saturday by 2019, and by 2018 if the redevelopment of the Bus Station goes ahead as planned.

  Sunday use is around 60% of that of Saturday and during the working week there is considerable spare capacity in the central area car parks, although this varies between car parks and will not be the general perception at some locations.

  This Strategy will seek to address the critical issue of Saturday parking capacity and to increase demand for parking spaces during the rest of the week.

- **REDUCING CONGESTION**
  Traffic congestion is seen by stakeholders as a key deterrent to accessing the City Centre, and therefore limits parking demand. This implies that reducing congestion would increase demand for parking from suppressed trips.

  Exeter City Council supports the Local Transport Plan 3 objective of seeking to achieve a step change in public transport, to minimise the need to travel and to reduce travel demand by car. However not all demand can be accommodated by sustainable transport and trip reduction alone, so car parking will retain an important role in providing the good access to the City Centre and is seen as crucial to the future prosperity of Exeter.

- **MAINTAINING INCOME**
  The City Council depends on the £6M income it receives from its car parks service every year to deliver a balanced budget and provide essential services. It is imperative that any changes to the parking offer as a result of this strategy at least maintain current income levels.

  Operating the car park portfolio requires significant investment as well as year on year maintenance to provide users with the level of service that they expect. It is essential that appropriate funding is available for on-going maintenance, refurbishment and renewal programmes and it may be necessary to increase overall income from car parking to fund this investment and ensure that an income stream is maintained for the long term.

Stakeholder Views

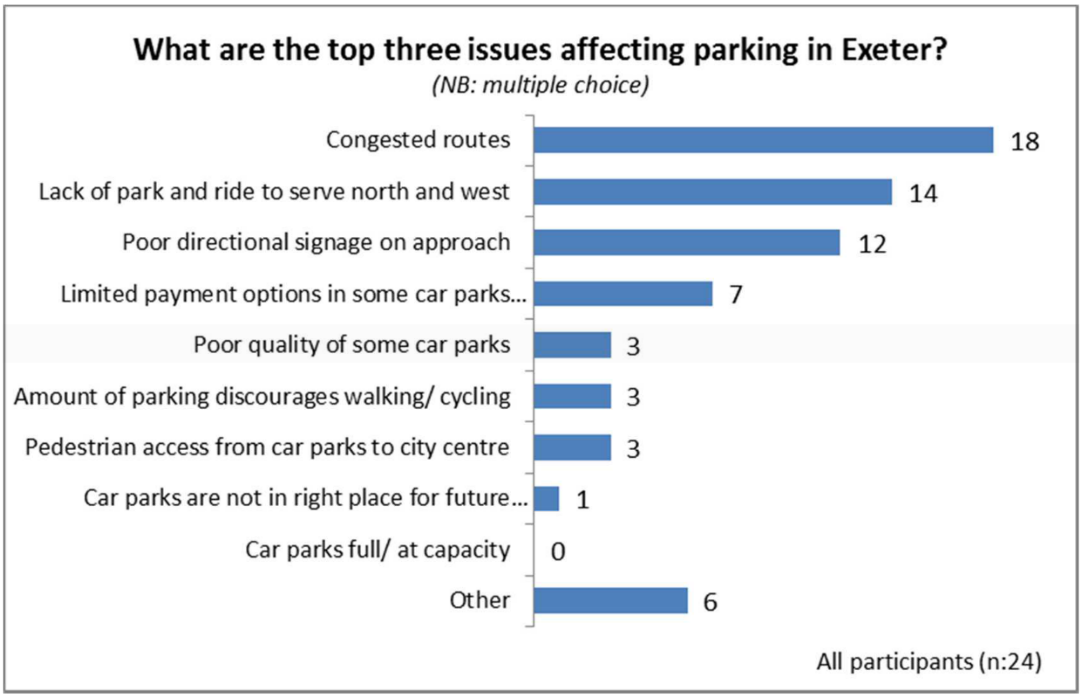
Engagement of local opinion and perception was very important for the successful analysis of this Parking Strategy, both to inform and influence the Strategy and to allow stakeholders a better understanding of the requirements and needs of the Council.

STAKEHOLDER WORKSHOPS

Around 70 stakeholders were invited to the workshop in November 2014, including representatives from a range of local businesses, organisations and groups such as Chamber of Commerce, Federation of Small Businesses, Princesshay Shopping Centre, Guildhall, John Lewis, NCP, APCOA, University of Exeter, Cultural Partnership, Phoenix Centre, Living Options Devon, hoteliers, Exeter St. James Forum, Royal Mail, Mecca Bingo, Ernst and Young, Stagecoach and Devon County Council.

Figure 1 summarises the most important issues to these stakeholders:

Figure 1: Stakeholders: Top Three Issues Affecting Parking in Exeter



The Stakeholders also felt:

- that that there is sufficient parking to meet current demand
- additional capacity is required to support the growth and development aspirations for Exeter, particularly in the South, East and West of the City;

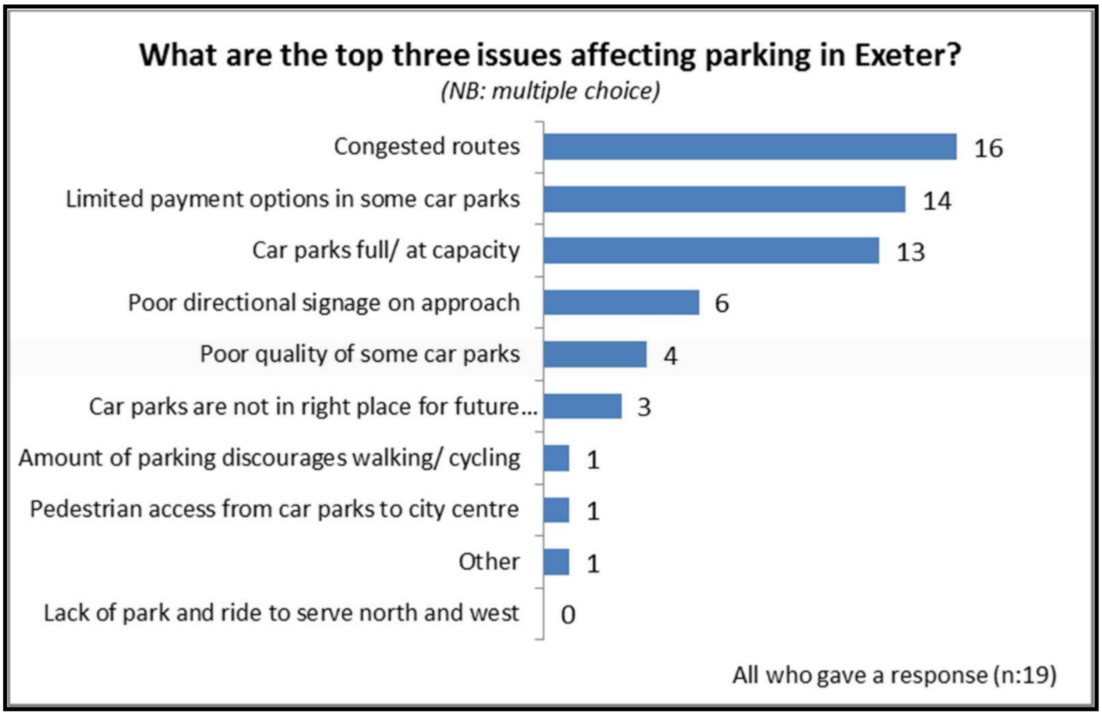
- positive about the condition of off-street car parks in Exeter, recognising that there is room for improvement in some car parks;
- The parking pricing/tariff structure needs to be given careful consideration to encourage shoppers/leisure users into the City and to increase the duration of their stay;
- Parking is intrinsically linked to the wider transport strategy, for example, stakeholders strongly support the need for improved public transport links to take the pressure off the road network;
- On and off street parking should be managed as one overall supply
- The Parking Strategy must consider potential changes to land use within the Central Area and how to respond to the changing face of the High Street

PARKING USER FOCUS GROUPS

In addition to the stakeholder workshop, parking users were randomly selected by specialist market research recruiters according to set socio-demographic criteria (gender, age, Socio Economic Group, area, working status and ethnicity) to ensure a good balance and broad geographic spread of respondents was achieved.

Figure 2 summarises the most important issues to these parking users:

Figure 2: Parking Users: Top Three Issues Affecting Parking in Exeter



Of particular interest is the perceived focus of the Parking Strategy which, as summarised in Figure 3 below, suggests "*making better use of existing facilities (quality, pricing, information), but no new provision*", though a significant number thought "*new central area parking*" was needed as well as "*additional P&R facilities*".

Figure 3: Parking User Focus Group: Direction of Parking Strategy

In summary, the selected parking users thought:

- Location, cost and payment type are the key considerations when selecting a parking location
- Lack of signage makes it difficult for visitors to navigate the Central Area. The current lack of signage/ information about the smaller car parks causes traffic congestion around Princesshay as drivers do not venture further afield to park
- There is strong demand for better information about the car parks; there is felt to be a need for live information, whether delivered through improved VMS or a Smartphone app.
- Commuter parking / employees need to be better provided for;
- The tariff structure needs to be given careful consideration to encourage shoppers/leisure users into the City and to increase the duration of their stay
- The current price differential between the different car parks is not considered significant enough and there is confusion over the current car park classification system. There is a feeling that longer stay parking in the City Centre should be cheaper, particularly in the outer, less popular car parks
- Payment mechanisms are key to duration of stay: pay & display limits the time spent in the Central Area. There is support for a pre-pay “Oyster” card scheme which could be used for parking, public transport, P&R;
- There is demand for parking promotions with restaurants/retailers and/or a loyalty card system;
- There is strong support for significant improvements to public transport to reduce car use

and congestion and most feel that the Parking Strategy should encourage people to think twice about their car use
- There is a general feeling that P&R, including rail-based P&R, should play more of a role in Exeter's future, with more sites serving different locations.

TOPSHAM COMMUNITY ASSOCIATION FEEDBACK

Feedback from the Topsham Community Association requested consideration be made of the following:

- Conversion of Topsham Quay to a medium/long stay car park rather than short stay as it serves recreational users (boaters, birdwatchers, hikers, cyclists) far more than shoppers
- Residents parking permits for Topsham car parks, prioritising those without house frontage
- The impact of proposed loss of the "T" bus service which the Association considers is likely to lead to more car journeys from Countess Wear to access the Doctor's surgery and other amenities
- Potential for allowing long stay durations of several days at Tappers Close for those travelling away to compliment adjacent railway station
- Is extra land available for parking at allotments or rugby club?
- Consideration of the influence of free on-street parking;

Key Stakeholder issues

- Reducing congestion would increase demand from suppressed trips
- Strong support for enhanced and additional Park and Ride services
- Poor directional and live capacity information about car parks
- Limited payment options in some car parks
- Hard to find a space at peak times

Parking Supply and Demand

Within the Central Area, Exeter City Council manages thirteen surface, two underground, and six multi-storey off-street car parks totalling 4,112 parking spaces. This includes 119 disabled spaces. 361 spaces are reserved for permit parking on weekdays and 145 spaces at the weekend. National Car Parks (NCP) operate a further two multi-storey and one underground car park totalling 573 spaces. Other operators including Total Car Parks, APCOA and Premier Park offer around another 660 spaces. Devon County Council through its Local Transport Plan estimate that there are 3,000 off-street Private Non-Residential (PNR) parking spaces in the City Centre, suggesting that the City Council controls just over a half of the off-street parking supply in the centre.

On-street parking is managed by Devon County Council and there is a significant supply of around 500 mainly pay and display parking spaces around the city centre, with some disabled parking areas and loading bays. Further out from the centre, there are 20 residents' on-street parking zones operated by Devon County Council, with some allowing permits for business and visitors including hotel guests.

Outside the City Centre, Exeter City Council operates four surface off-street car parks in Topsham totalling 152 spaces, and an off-street car park in Heavitree which has 38 spaces.

There are three Park and Ride (P&R) sites to the East, South East and South of Exeter. Matford P&R, to the South) is operated by Exeter City Council with 451 spaces (120 additional bays in an overflow area were lost to development in late 2015). The other two P&R sites totalling 1,250 spaces are operated by Devon County Council. In context, Park & Ride adds a further 21% of parking stock to the City.

CITY CENTRE

The existing use of the off-street car parks is markedly different between weekday, Saturday and Sunday and is highest on Saturdays where it is currently close to practical capacity.

Sunday use is around 60% of that of Saturday and during the working week there is considerable spare capacity in the central area car parks as shown in Figure 4 below, although this varies between car parks and will not be the general perception at some locations.

CITY CENTRE SATURDAYS

The car parks are already close to capacity on Saturdays as shown in Figure 4 below, with the overall use at 88% of capacity when at maximum usage. 14 of the 23 central area car parks are over practical capacity (90%), with nine of those at or over capacity.

The maximum uses of those with spare capacity on a Saturday were:

- NCP Summerland Gate 89%
- Parr Street 88%
- King William Street (formerly Leighton Terrace and Annexe 88%
- Triangle 87%
- Okehampton Street 84%
- Cathedral & Quay 77%
- Magdalen Road 77%
- Haven Bank 74%
- Princesshay 2 58%
- John Lewis 37%

Figure 4: Saturday Parking Profile by Hour of Day

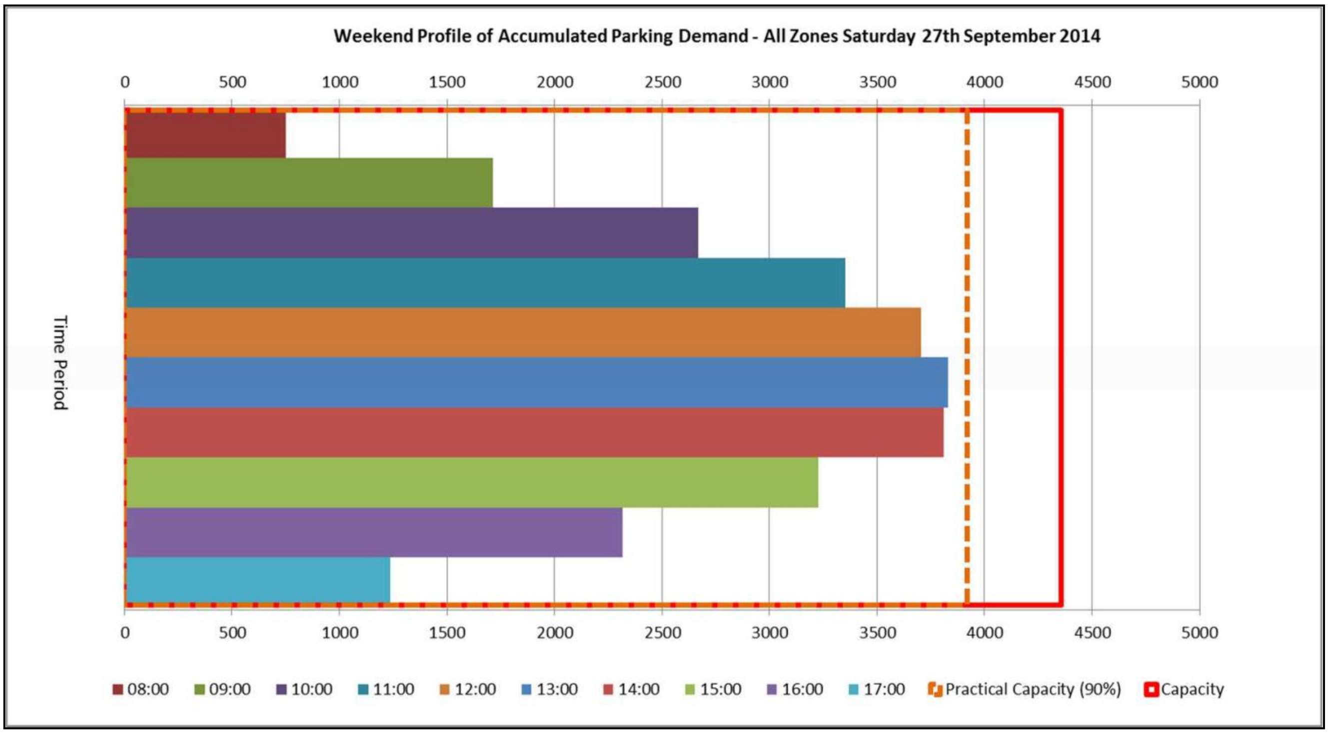
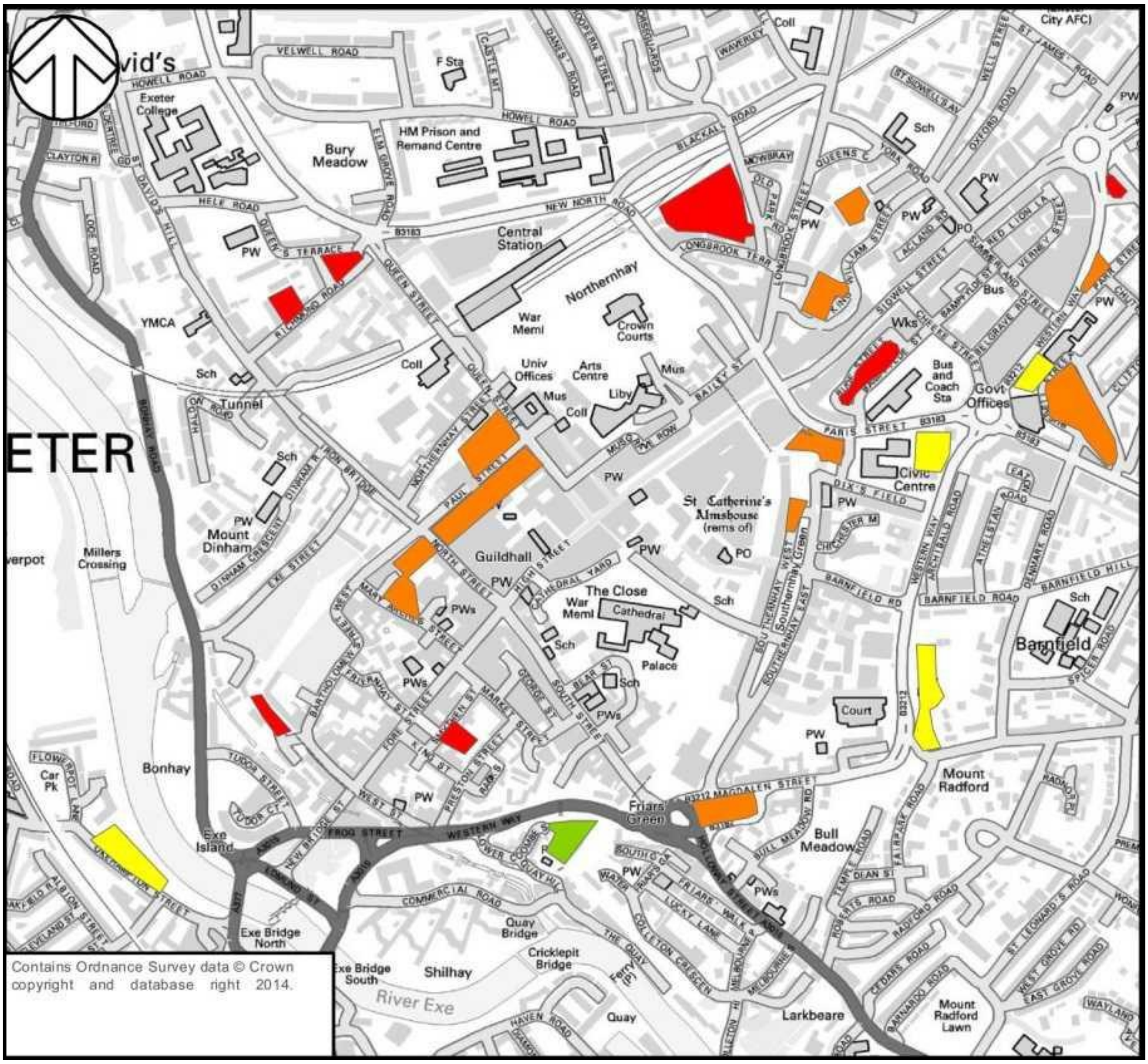


Figure 5 below shows that on Saturdays in central Exeter many car parks are at practical or actual capacity.

Figure 5: Car Park Utilisation on Saturday (September 2014)

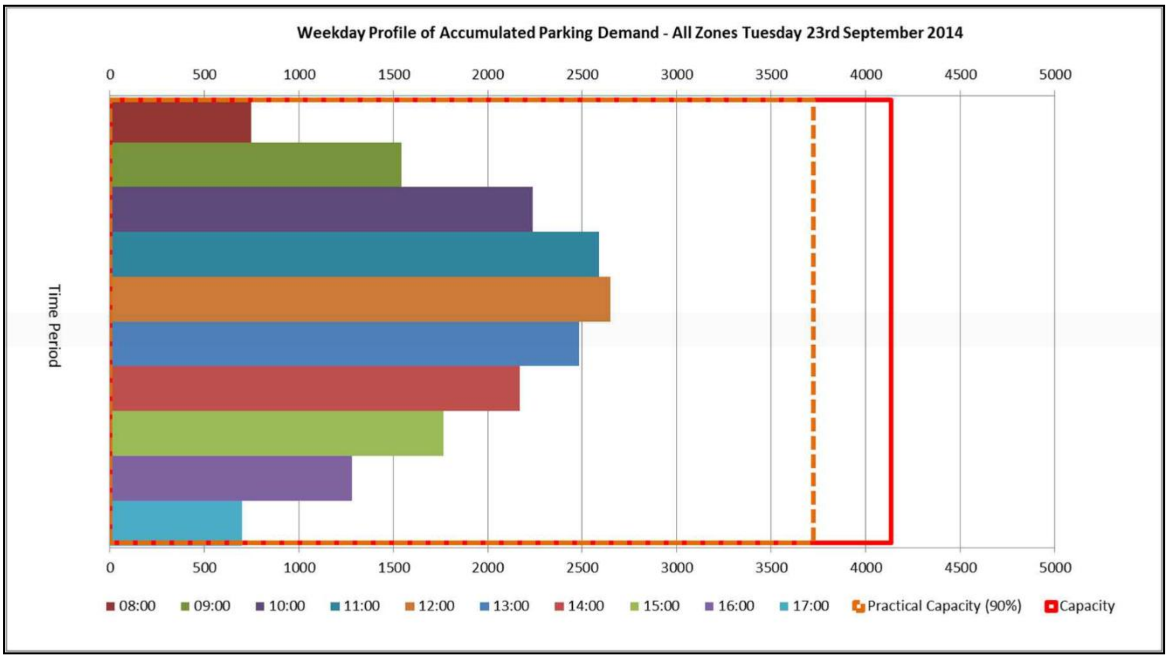


The future growth predictions for Exeter's Core Strategy with the addition of growth from Cranbrook to the East of the City and the South West Exeter developments, **suggest that Saturday city centre car parking will run out of capacity in 2018**. Without the addition of Cranbrook and South West Exeter, which add a significant population to the area, the absolute parking capacity may stretch a further three years till 2021. However parking is at its practical capacity now which means a proportion of cars will have to drive to more than one car park to find a space with added journey time and potential for more queuing and congestion for other road users.

CITY CENTRE WEEKDAYS

During the working week as shown in Figure 6 below, overall there is considerable spare capacity in the city centre car parks but this varies between car parks and will not be the general perception at some locations. Sunday use is around 60% of that of Saturday.

Figure 6: Weekday Parking Profile by Hour of Day



Individual car parks that are experiencing demand approaching or in excess of practical capacity during the weekday peaks are as follows:

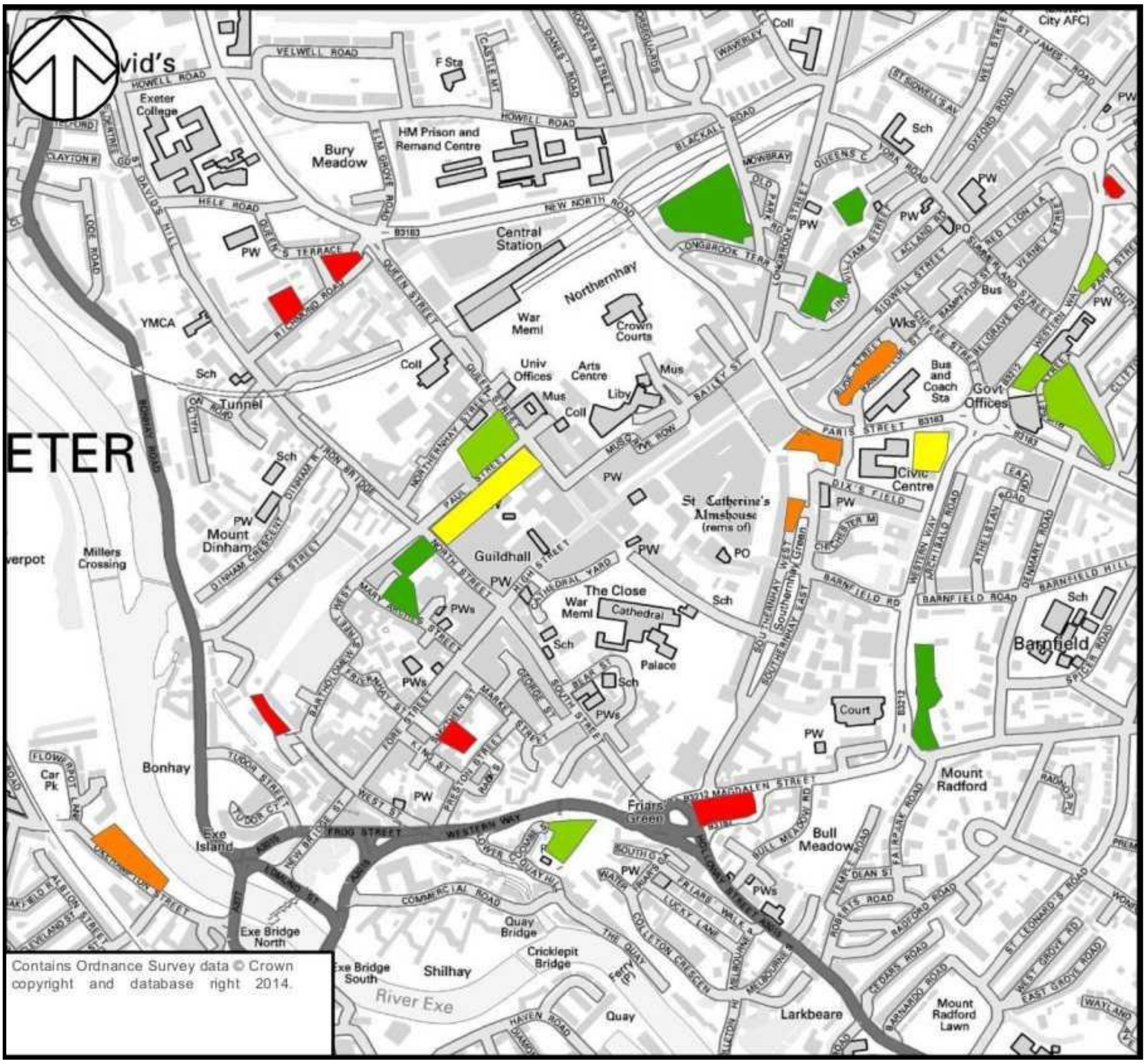
- Belmont Road 137%
- Bystock Terrace 112%
- Bartholomew Terrace 107%
- Richmond Road 106%
- Smythen Street 106%
- Princesshay 102%
- Magdalen Street 102%
- Princesshay 3 96%
- Bampfylde 94%
- Okehampton Street 94%
- Guildhall 90%

Car parks that have considerable spare capacity during the weekday are as follows, noting only those that have less than 50% of maximum use at their highest usage point during the day:

- John Lewis 37%
- King William Street 34%
- Haven Banks 15%

The map of central Exeter at Figure 7 below shows the car parks that are at and over capacity at the peak demand part of the day (usually around mid-day), and those which are at and over operational capacity.

Figure 7: Car Park Utilisation on Weekday (September 2014)



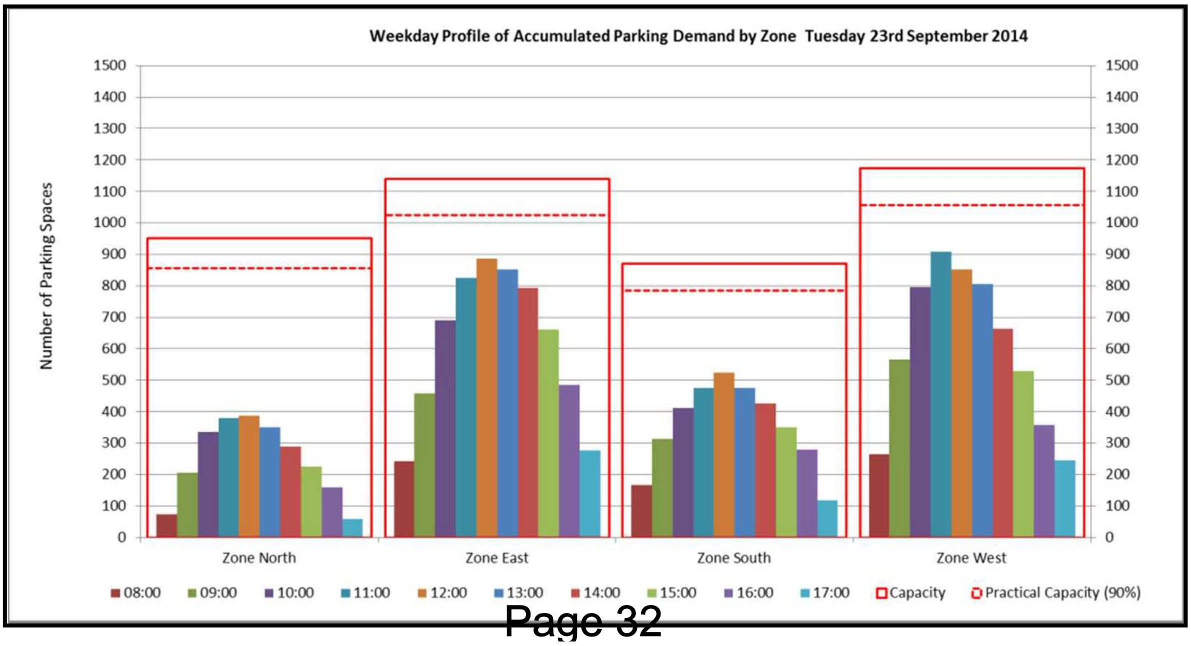
PARKING BY QUADRANT (ZONE)

Car park capacity in the City Centre has also been analysed by quadrant: approximately North, South, East and West.

NORTH	EAST	SOUTH	WEST
• Howell Road • John Lewis • King William Street	• Bampfylde • Belmont Road • Parr Street • Princesshay (NCP) • Princesshay2 • Princesshay 3 • Summerland Gate • (NCP) Triangle	• Cathedral & Quay • Dean Clarke House (PPS) • Haven Banks • Magdalen Road • Magdalen Street • Market Street (NCP) • Smythen Street	• Bartholomew Terrace • Bystock Terrace • Central Station (APCOA) • Flowerpot (Premier Park) • Guildhall • Harlequins Centre • Isca Place (Premier Park) • Mary Arches Street • Okehampton Street • Richmond Road • St Davids Station (APCOA)

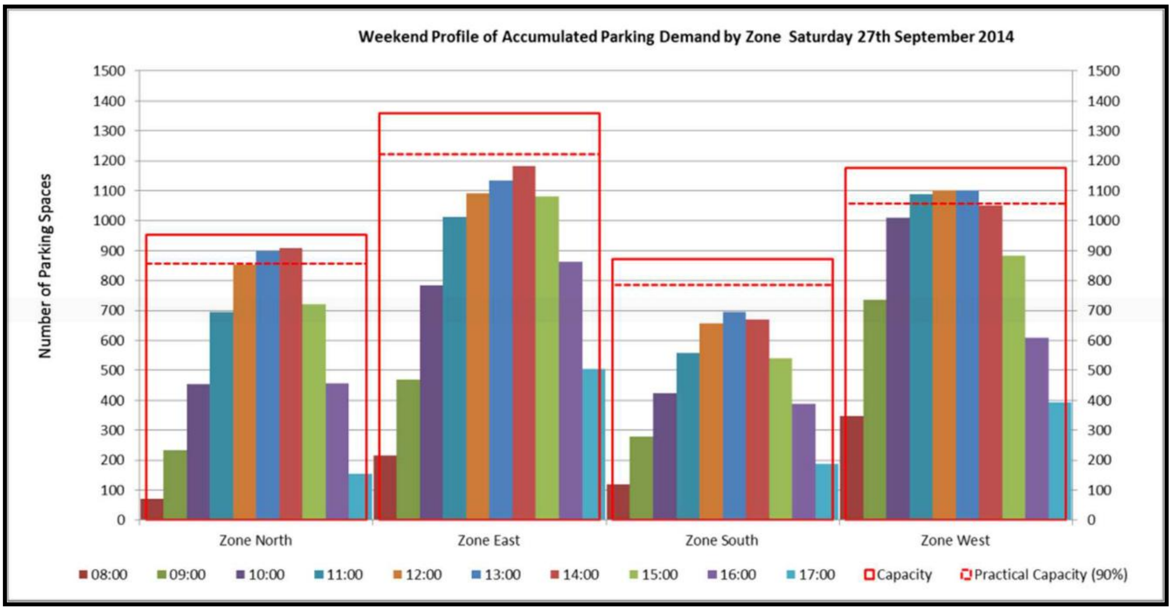
Although there is very high use on Saturdays, the zonal assessment shown in Figure 8 below suggests the maximum parking use in the North and West zones are over 90% capacity and therefore at practical operational capacity but that the East and South zones have some spare capacity.

Figure 8: Saturday Parking Profile by Hour of Day by Zone



On weekdays, demand is highest in the East and West zones, with the North Zone having the lowest use.

Figure 9: Weekday Parking Profile by Hour of Day by Zone



OPENING HOURS BY LOCATION

Table 2 below shows that 10 of the 24 city centre parks are open 24/7, which represents just over a quarter of the overall supply. Just over half the parking supply is available till 11:30 p.m. each evening.

Table 2 Central Area Car Park Capacity by Hours of Operation

	ZONE				
CAR PARK BY OPENING HOURS	EAST	NORTH	SOUTH	WEST	TOTAL
24 hour	426	337	362	612	1737
Bampfylde Street	88				
Belmont Road	27				
Bystock Terrace				50	
Central Station				47	
Dean Clarke House				160	
Flowerpot				70	
Howell Road		337			
Magdalen Road			213		
Magdalen Street			100		
Okehampton Street				81	

Parr Street	41				
Smythen Street			49		
St Davids Station				204	
Triangle	270				
7am to 2am	503				503
Princesshay (NCP)	264				
Summerland Gate (NCP)	239				
7am to 12am				470	470
Mary Arches Street				470	
7am to 11.30pm	171				171
Princesshay 3	171				
7am to 11pm	347		395	91	833
Cathedral & Quay			395		
Harlequins				91	
Princesshay 2	347				
7am to 9pm		244	70	440	754
Guildhall				440	
King William Street		244			
Market Street (NCP)			70		
7am to 8pm			176		176
Haven Banks			176		
7am to 7pm				275	275
Isca Place				275	
8am to 8pm		425			425
John Lewis		425			
8am to 6pm*				97	97
Bartholomew Terrace				46	
Richmond Road				51	
TOTAL					5441

Note * Bartholomew Terrace and Richmond Road are closed for public parking at 6pm but allow residents parking with permits to park 24 hours a day.

LONG AND SHORT STAY PARKING

City Centre ticket sale information, excluding permits and pay-by-phone information on a typical weekday and Saturday shows the overwhelming use of both short and long stay parking provision by shorter stay users. 66% of long stay parking provision is being used by parking for up to 3 hours on a weekday and slightly more (71%) on a Saturday. The comparative short stay parking information indicates 88% of short stay car park users park for 3 hours or less and 62% park for 2 hours or less.

Parking of over 5 hours, which can mainly be attributed to commuter parking, accounts for around 23% of the long stay parking on a weekday. 6% of short stay parking is also over 5 hours. This suggests that commuters either have alternative parking, or are using season tickets or other modes to travel to and from the central area.

The City Council does not currently provide for long-term car parking, particularly for those people travelling by train from the various railway stations around the city.

The Council offers pre-paid season tickets, which are available to anyone, allowing unrestricted access to the Long Stay car parks of Belmont Road, Bystock Terrace, Cathedral & Quay, Haven Banks, Howell Road, Parr Street, Triangle, as well as Magdalen Road (Monday to Friday Only) and Richmond Road (8am to 6pm). There are currently 120 active season tickets.

In addition to the season tickets there are 26 active business permits, allowing access to Long Stay Cathedral and Quay, with a further 8 having access to Short Stay Bartholomew Terrace. Adding this to the 135 Resident's Permits that also have unlimited access to a long stay car park implies a potential of 30% long stay parking at Long Stay car parks.

EVENING USE

The majority of City Centre retail, leisure and residential growth is likely to happen in the East and North zones of our parking model, including growth that is anticipated to generate more evening car parking demand. The Exeter Vision Partnership's Draft Strategy for the Central Area (June 2013) aims for a vibrant, welcoming and safe evening and night time economy as part of its overall ambition to improve the wellbeing of Exeter. These documents together with several other similar references in policy and Strategy documents highlight the importance of evening parking as a crucial part of helping improve the evening and night time economy.

The majority of the City Centre parking, both on and off street, is either free after 6pm or has a small tariff: parking after 6pm at Mary-Arches for example. Half of the off-street car parking supply is available till at least 11:30pm, with just over a quarter (10 of the 24 car parks) operating 24/7. In addition, two of the car parks, Bartholomew Terrace and Richmond Road, are set aside for residents' permit only parking after 6pm. This together with the availability of a significant on-street parking resource suggests that there is ample evening parking. The benchmarking exercise shows that Exeter City Council operated car parks stop charging earlier in the evening than other operators within Exeter and other comparable Authorities.

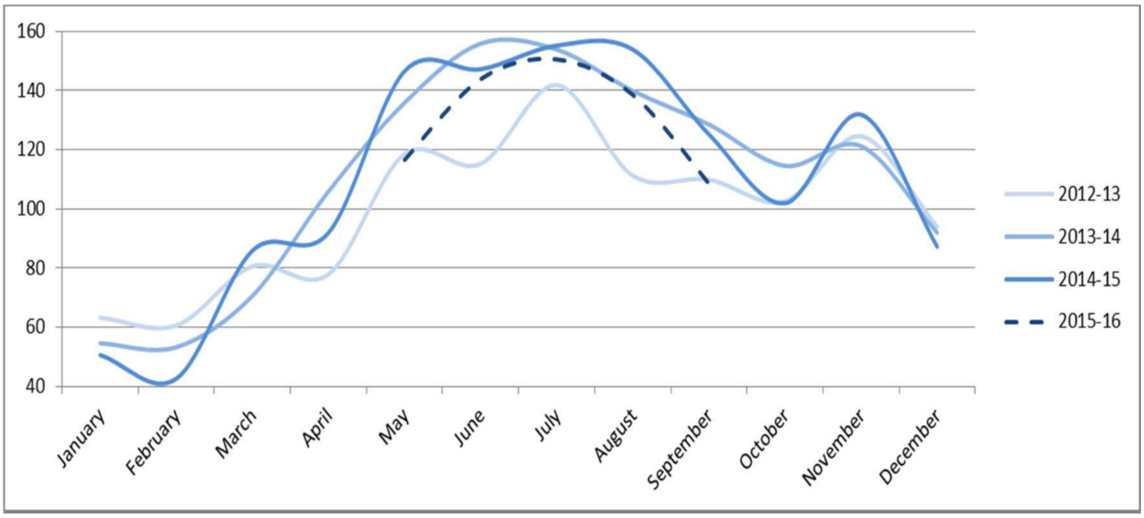
Feedback suggests that there is far greater use of on-street parking in the evening when off-street car parks (particularly multi-storeys and underground facilities) feel less welcoming, especially for women. The lack of time constraint for on-street parking also encourages its use.

COACH PARKING

The numbers of tourist and visitor coaches that use Exeter Bus Station have been monitored in recent years and show an expected trend of more coaches over the summer months as well as November and December for the Christmas markets and shopping. **Figure 10** below shows an indexed yearly profile of use from 2012/13 onwards. The actual numbers are confidential, and by their nature cannot offer complete tourist and visitor coach information for the City, but indicate a small but significant increase in use from 2012/13 to 2013/14, with similar levels in 2014/15 and the partially observed 2015/16.

There are seven regular coach operators that use the Bus and Coach Station, mixed with numerous less frequent operators. The loss of coach parking as part of the re-development of the Bus and Coach Station will be to direct tourist coaches to the one-way South Street for drop off and pick-ups. This will require the removal of on-street parking bays to accommodate drop-off and pick-up areas, and as a one-way street will allow safe use for those accessing and egressing both UK and European coaches as the footways on either side of the road can be used to allow access and egress.

Figure 10: Indexed Coach Parking at Exeter Bus Station



Note: index of 100 has been used to represent average monthly use during 2012/13

It is understood that coaches will be directed from the M5/A38/A30 via Countess Wear and Topsham Road to set down on South Street and then travel down to Exe Bridges and out to the Haven Banks car and coach park at Tan Lane and return. It would also allow the potential for pick up to be made from Haven Road as part of a visit to the City Centre and Quay.

Coach parking counts in the peak use summer months of 2014 suggest that there are occasions when up to 9 coaches can be parked at the bus station but generally there are between two and six coaches during late morning / early afternoon.

No concerns have been raised regarding the coach parking capacity of eight bays at Haven Banks car and coach park following the proposed closure of the bus and coach station, suggesting that the current provision will be adequate for the foreseeable future. As Haven Banks is one of the least used car parks finding additional coach parking space should be possible.

TOPSHAM

Topsham is a local centre to the south east of the City and has a rich history including, in medieval times, operating the second largest trading port in England as well as controlling goods to its neighbouring Exeter. Like many historic coastal towns, its streets are narrow which has led to one-way driving on some streets.

The unclassified road through Topsham connects the A376 Exmouth Road with Countess Weir roundabout and northwards to central Exeter and is a commuter route to Exeter both by car and train. Topsham's railway station is on the Avocet line connecting Exeter with Exmouth and has the only passing point on the single track line.

There are four ECC operated off-street, pay and display surface car parks around Topsham, offering 151 parking spaces all year round and 216 during summer months:

- Tappers Close: 26 spaces next to the Railway Station – local car park with tariff structure geared to longer stays
- Holman Way: 68 spaces half way between the Railway Station and the Quay – local car park with tariff structure geared to longer stays
- Topsham Quay: 26 + 65 spaces at the Quay – tariff structure geared towards shorter stays
- Matthews Hall: 31 spaces in the town centre – tariff structure geared towards shorter stays

Topsham quay capacity varies seasonally with 26 bays all year and up to an additional 65 bays during summer months (May- Oct) when the boatyard is open. All the car parks are well used at weekdays and weekends.

Two of the four car parks (Matthew Halls and Holman Way) are at capacity for both weekday and Saturday. The other two car parks at Topsham Quay and Tappers Close have significant spare capacity (maximum of 40% use) during the week, but are around two-thirds full on Saturdays. The analysis suggests that there is some capacity to cater for future growth within the off-street car parks though perceptually on-street car parking seems close to capacity at times in the day. The short stay car parks are mainly used for up to two hours stay (85%), and the local parking has a more varied use with, in broad terms, a third of users staying up to two hours, a third up to three hours, and a third four hours or more. From reviewing the parking sales by duration of stay, the desire for longer duration parking is not demonstrated at Topsham Quay as the majority of tickets are either up to one hour or two hours with a duration of stay profile that is near identical to Matthew's Hall short stay car park. This is contrary to the perception of Topsham stakeholders reported earlier.

Key Parking Supply and Demand issues

- Saturday City Centre car parking will run out of capacity in 2018
- Weekday capacity is around 60%
- Most city centre parking is short stay use
- Only 23% of weekday parking is commuter parking
- Demand for evening parking is predicted to increase

Parking Operations, Tariffs and Revenue

Location, cost and payment type are the key elements drivers take into account when parking.

CAR PARK OPERATION

Exeter's parking provision has been designated into four different categories: *long stay*, *short stay*, *Premium* and *Local.* The tariff structure is the determining factor for *long stay* or *short stay* parking, which are pay and display. *Premium* car parks are all pay on foot with barrier entry and exit and generally of a higher standard. *Local* car parks are also pay and display and help to serve the needs of a local centre and are tariffed accordingly.

PARKING TARIFFS

The parking tariffs are set by type of car park, with the *Long Stay* tariff geared to encourage long stay parking, *Short Stay* tariff, generally located closer to the centre, geared towards shorter stays and *Premium* parking marginally more expensive than the *Short Stay* tariff. *Local* parking in Topsham, Heavitree and at Okehampton Street has a lower price structure to encourage the use of local centres.

Table 3 shows the parking charges since 2013, which were generally matched in the NCP car parks. There has been no increase in parking tariffs since 2013.

Table 3: 2013 Tariff Structure

	1 HR	2HRS	3HRS	4HRS	5HRS	6+HRS
Premium	£1.80	£2.60	£3.50	£6.50	£8.80	£11.80
Short Stay	£1.20	£2.20	£3.30	£5.70	£7.70	£10.80
Long Stay	£0.80	£1.20	£1.80	£3.20	£5.00	£6.20
Local	£0.60	£0.80	£1.00	£1.20	£1.80	£1.80

It is significant to note that there are no short stay restrictions at long stay car parks or vice versa, though there is a maximum stay of 3 hours at the car park in Heavitree.

On street parking tariffs in the city are £0.70 for half an hour and £1.50 for an hour (Mon to Sat) or £1.00 for an hour and £2.00 for two hours (Sundays and Bank Holidays) On-street parking is restricted to a maximum of 1 hour from Monday to Saturday or 2 hours on Sundays and Bank Holidays. Off-street short stay tariffs are £1.20 for an hour and £2.20 for two hours on all days. Parking is free after 6pm. On-street parking in Topsham is free.

LOCAL COMPETITION

Exeter City Council manages and operates the significant majority of publicly available car parking space in central Exeter with approximately 4,100 spaces in 21 off-street car parks within 1½km of the centre.

There are three privately managed National Car Parks (NCP) car parks in the Central Area with 573 spaces. NCP match ECC's tariff structure for two of their three car parks, with the third (70 spaces) having a different structure with comparatively more expensive shorter stay parking and marginally less expensive long stay parking than ECC's Short Stay tariff. Two of the three NCP Car Parks offer season tickets, which are 15% more expensive than ECC's.

In addition, Total Car Parks Ltd have 275 spaces to the north of the centre. They are marginally undercutting the Long Stay tariff for longer stay users, and for shorter stay users are charging tariffs that sit between the Long and Short Stay tariff structure. APCOA manages car parks at Exeter St David's and Exeter Central train stations and have a long stay tariff geared towards rail users as well as a 3hr stay at Exeter St Davids, presumably to attract local use for any unused bays. Premier Car Parks manages two car parks totalling 90 spaces at Exeter Cathedral, where charges are close to the Premium parking tariff and manage Flower Pot Lane car park which is close to and only marginally more expensive than Okehampton Street Car Park.

Devon County Council operates on-street pay and display parking, which is time-restricted to a maximum stay of one hour in the central zones and is estimated to offer around 500 spaces in the central area. On-street parking tariffs are marginally higher than the hourly cost of ECC's Short Stay parking.

Park and Ride services provided in three sites operated by both Exeter City and Devon County Councils provide an additional 1,700 spaces on the outskirts of the city. ECC manages the Matford Park and Ride (although this will be taken over by Stagecoach as part of the relocation of their bus depot), while Devon County Council manages the Sowton and Honiton Road sites. There is no charge for parking at the P&R sites, with revenue solely related to the purchase of the bus ticket of £2.50 for an adult day-return.

All competitors charge for all their operating hours.

Table 4: Comparative Tariffs

Operator & Tariff Band	Tariff (£)					
	1hr	2hrs	3hrs	5hrs	8hrs	All Day
ECC- Premium	1.80	2.60	3.50	8.80	11.80	11.80
ECC- Short Stay Shoppers	1.20	2.20	3.30	7.70	10.80	10.80
ECC – Long Stay Visitors	0.80	1.20	1.80	5.00	6.20	6.20
ECC – Local	0.60	0.80	1.00	1.20	1.80	1.80
NCP – Princesshay	1.80	2.60	3.50	8.80	11.80	11.80
NCP – Summerland Gate	1.20	2.20	3.30	7.70	10.80	10.80
NCP – Market Street	2.50	4.50	6.00	10.50	10.50	10.50
APCOA – Exeter Central	24 hours £8.10, 10:00-00:00 £4.90					
APCOA – Exeter St David's			3.90			9.90

Premier Park – Flower Pot Lane	1.00	1.00	1.00	1.50	1.50	2.00
Premier Park – Exeter Cathedral	1.50	3.00				
Total Car Parks – Isca Place	1.00	1.80	2.70	4.90	6.00	6.00
DCC – On-Street	Zone A 30min: £0.70, 1hr: £1.50					
	Zone B 30min: £0.70, 1hr: £1.60, 2hr: £2.30					
Matford Park & Ride	Adult Day Return £2.50					
Honiton Park & Ride						

REGIONAL COMPARISONS

The charging structures in other UK by towns and cities of comparable population size and characteristics have been reviewed. These, sorted by population size, are Canterbury, Bath, Worcester, Chelmsford, Cheltenham, Gloucester, Cambridge, York, and Oxford, with Exeter's population being in the mid-range of the above.

The charging hours of Exeter's Long and Short stay car parks (generally between 08:00 and 18:00 hours) is the shortest duration of any town and city compared. The majority charge up to 8pm or 9pm.

In terms of the hourly costs for Long and Short stay car parks, Exeter's *Short Stay* parking charges are in line with the average cost for shorter durations, and comparatively cheaper for those staying for longer durations. Exeter's *Long Stay* parking charges are significantly cheaper for shorter stays as well as cheaper than the average for longer stays. All the comparative towns and cities charge more for short stay parking in long stay car parks than the equivalent time in the short stay car parks to discourage short stay users from using long stay car parks.

Table 5: Benchmarking: Average Tariff Comparison

Operator and Tariff Band	1HR	2HR	3HR	5HR	8HR
	£	£	£	£	£
All Car Parks Short Stay	1.34	2.42	3.49	9.08	13.30
ECC Short Stay	1.20	2.20	3.30	7.70	10.80
All Car Parks Long Stay	1.71	3.11	4.47	8.60	11.71
ECC Long Stay	0.80	1.20	1.80	5.00	6.20

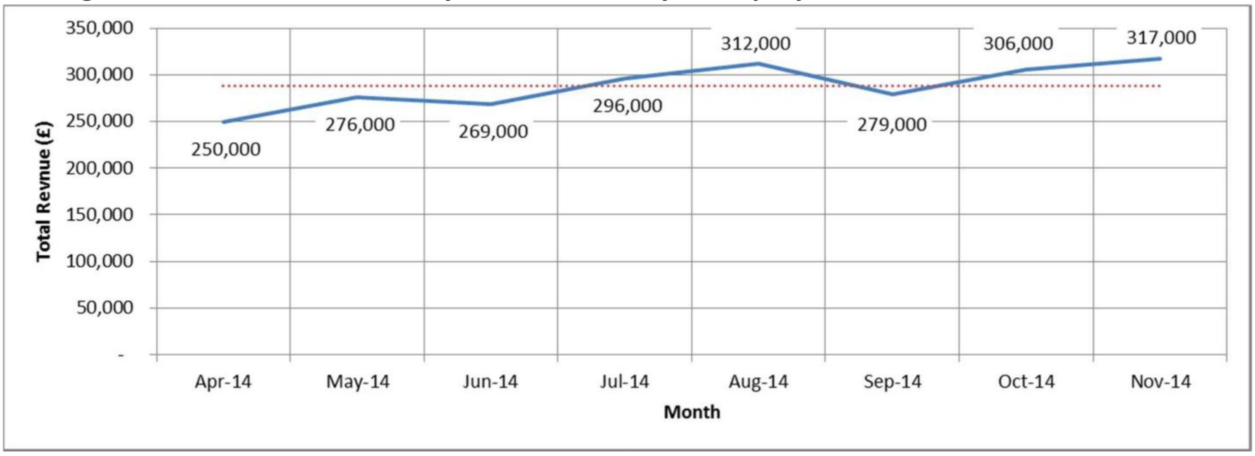
These benchmarking comparison with other similar cities provides re-assurance for considering alterations to the tariff structure, including shorter stay parking in long stay bays, and charges for evening use.

Of the compared towns and cities, Oxford and Cambridge use a separate tariff for Saturdays, and Gloucester uses a separate tariff for Sundays. For example, Oxford's parking tariff which is between 21% and 27% more expensive than on other days.

PARKING REVENUE

Figure 11 below shows how car park income varies throughout the year, with car parking use generally building from April to November with slight troughs in June and September. The months of July and September represent average use across the year. Unsurprisingly, December has the highest monthly income.

Figure 11: Seasonal Variability of the Total Pay & Display Revenue from Car Parks



PROJECTED INCOME

The projected income, assessed on a 2014 Net Present Value (NPV) basis, for car park operations **without interventions** is solely based on population and development growth using the existing tariff structures. This shows a year on year increase of approximately £90K due to population growth until 2018 when capacity is reached on Saturdays and trips and income are thereafter suppressed.

Table 6: Projected Income – Scenario 1 Do Nothing

TARIFF CHANGES APPLY EVERY DAY:	ADDITIONAL FIRST YEAR INCOME	INCOME 2014	INCOME 2026	YEAR CAPACITY REACHED ON SATURDAYS
No Tariff increase	£90K (based on population / development growth)	£6.0M	£7.1M	2018

PARKING TARIFF ELASTICITY

Elasticity factors vary with journey purpose, car ownership and public transport provision and use. However, in general demand is relatively in-elastic to price changes. Leisure trips decline more markedly with increases in tariff compared to general purpose trips although the influence of price changes are small for both: a 1% increase in tariff equates to a 0.1% reduction in demand. This means that increasing tariffs will not materially affect demand and will increase income as users that are dissuaded by price will be relatively small in number.

Obviously, the larger the scale of any tariff alteration, the more demand may be affected and the confidence in the modelling declines if tariffs were increased by more than 20%. However, sensitivity tests were carried out on the elasticity model, which as a linear relationship showed only marginal differences even with relatively extreme changes in the relationships between the parameters. For example doubling or halving the elasticity produced only small changes in demand with tariff increases as the relationship is relatively rigid.

TARIFF OPTIONS

Matching the Short Stay tariff for shorter stays up to 4hrs duration in Long Stay designated parking would hardly reduce overall demand and generate an average additional income of upto£430K per annum initially in 2016, increasing gradually through population growth to £500K in 2026.

A linear tariff would be simpler for users to understand and may encourage more use of top-up type payments through mobile phones. Based on current usage patterns the following linear tariffs (Proposal 1 and Proposal 2) would increase annual income by 2.3% and 4.3% respectively.

	Current Tariff	Proposal 1	Proposal 2
Premier			
1 hr	£ 1.80	£ 2.00	£ 1.50
2 hr	£ 2.60	£ 3.00	£ 3.00
3 hr	£ 3.50	£ 4.00	£ 4.50
4 hr	£ 6.50	£ 5.00	£ 6.00
5hr	£ 8.80	£ 6.00	£ 7.50
All day	£ 11.80	£ 12.00	£ 12.00
Short			
1 hr	£ 1.20	£ 1.00	£ 1.20
2 hr	£ 2.20	£ 2.00	£ 2.40
3 hr	£ 3.30	£ 3.00	£ 3.60
4 hr	£ 5.70	£ 4.00	£ 4.80
5hr	£ 7.70	£ 5.00	£ 6.00
All day	£ 10.80	£ 10.00	£ 10.00
Long			
1 hr	£ 0.80	£ 1.00	£ 0.80
2 hr	£ 1.20	£ 2.00	£ 1.60
3 hr	£ 1.80	£ 3.00	£ 2.40
4 hr	£ 3.20	£ 4.00	£ 3.20
5hr	£ 5.00	£ 5.00	£ 4.00
All day	£ 6.20	£ 6.00	£ 6.00

The removal of the hour only tariff, meaning users would have to purchase two hours as a minimum stay, which is the case for several other cities. Based on current usage patterns this would increase annual income by 7%.

SATURDAY PARKING TARIFF SENSITIVITIES

A series of sensitivities on tariff alterations were carried out to assess the impact on parking demand as well as income. The main focus was on Saturdays where demand is currently at practical capacity and predicted to exceed supply by 2018. Increasing tariffs on Saturdays, compared to week day provides a simple economic style partial solution of supply and demand to reduce demand in the centre, with the added benefits of making P&R, bus and train travel more financially attractive as well as more income for the Council. However, modelling suggests that to reduce demand on Saturdays by solely using financial measures would require a severe 25% cumulative year on year tariff increase over the next ten years, equating to tariffs of more than 10x current levels by 2026.

Sensitivity tests have been carried out to understand the effects of more plausible increases in tariff, both to understand the effect on reducing demand, as well as the relative effect on income:

- A stepped blanket increase of 50p every third year from 2016;
- A stepped blanket increase of £1 every third year from 2016; and
- A one off blanket increase of £2 in 2016

The results of the sensitivity tests show that any small increase makes little difference to the capacity issue and each scenario simply delays reaching capacity by a year (2019).

METHODS OF PAYMENT

Most of the public off-street parking supplied by Exeter City Council and National Car Parks is pay and display. Customers can pay by cash with coins and, although change is not given, the machines allow extra time for overpayment so no payment is forfeited. Thirteen of the pay and display car parks accept credit or debit cards for all tariffs and there is no minimum purchase price. Payment by mobile phone is also offered at all of Exeter's pay and display car parks and season tickets and permits are available for individuals, local residents and businesses.

The *Premier* car parks are pay on foot, with machines that accept coins, notes and cards. NCP offers internet based pre-booking for its Market Street car park as well as season tickets for Market Street and Summerland Gate car parks.

PAY BY MOBILE PHONE

Payment by mobile phone allows a much more flexible use of pay and display parking. Exeter City Council uses the PayByPhone® website and mobile phone application which allows your mobile phone to pay and the parking fee is charged to your credit or debit card. In addition to not having to queue at a pay and display machine or find the correct change, you can pay for your parking session using your phone from your car. You can also choose to receive reminder texts (for a charge of 15p) so that you always know when your parking session is about to end and can add more parking time from wherever you are.

This payment option is relatively new and requires setting up a user account on-line prior to use, as well as a service charge of 10p for each time you park. For some customers, the benefit of not needing change together with optional reminders when the car parking is about to expire, allowing remote renewal, outweighs the initial set up inconvenience and service charge. Only 5.7% of possible parking payment transactions were made via Pay by Phone during October 2015.

SEASON TICKET AND PERMIT PARKING

Any customer is able to purchase a season ticket for daily use at any of the following car parks at a cost of £260.00 per quarter. There are currently only 120 active season tickets.

- Belmont Road
- Bystock Terrace
- Cathedral & Quay
- Haven Banks
- Howell Road
- Parr Street
- Triangle
- Magdalen Road (Monday to Friday only)
- Richmond Road (8am to 6pm only)

The City Council's permit schemes offers a range of permits for with different eligibility criteria and at different prices. The car parks where permit parking is offered are not necessarily those with spare capacity. No permit schemes operate in Topsham.

The Council offers a city centre residents' parking permit for residents of specific streets to use specific car parks, as below. Residents' permits cost £125 per annum since 2014. Currently 149 permits are active:

Bartholomew Street Car Park (44 active permits): Bartholomew Street East, Bartholomew Street West, Bartholomew Terrace, Carpenter Close, Fore Street, Friernhay Street, King Street, The Mint, New Bridge Street, Rackclose Lane, St Olaves Mews, Stepcote Hill and West Street. This permit is also accepted at Cathedral & Quay Car Park due to the small capacity of Bartholomew Terrace Car Park (46 spaces).

Belmont Road and Parr Street Car Parks (11 active permits) – Belmont Road, Chute Street, Codrington Street, Parr Close, Parr Street and Sidwell Street. Permit accepted at both sites.

Cathedral & Quay Car Park (19 active permits) – Coombe Street, George Street, Guinea Street, John Street, King Street, Little Rack Street, Lower Coombe Street, Market Street, New Bridge Street, Preston Street, The Quay, Rack Street, South Street, St Marys Steps Terrace, Stepcote Hill and West Street.

Gordons Place Car Park (9 active permits) – Fore Street (Heavitree), Regent Square and Sivell Place.

Okehampton Street Car Park (4 active permits) – Okehampton Street.

Richmond Road and Bystock Terrace Car Parks (62 active permits) – Bystock Close, Bystock Terrace, Exe Street, Little Silver, Lower North Street, Napier Terrace, North Street, Northernhay Square, Northernhay Street, Queens Terrace, Richmond Road, Silver Terrace and St Davids Hill. Permit accepted at both sites.

Bartholomew Terrace and Richmond Road have exclusive residential use between 6pm and 8am. With the exception of the Cathedral & Quay Business Permit no parking space is guaranteed to a permit holder.

Business Permits are available for two car parks only. Businesses in certain addresses within particular streets are eligible for a permit but only if a vehicle is required to help operate the business:-

- Bartholomew Terrace car park - £205 per annum. Currently 6 active permits.
- Cathedral & Quay car park - £565 per annum. Currently 19 active permits.

The daily cost of permit parking, based on 365 parking days per year is:-

Type of permit	Cost per day
Season Ticket	£2.85
Residents Permit	£0.34
Bartholomew Terrace Business Permit	£0.56
Cathedral & Quay Business Permit	£1.55

BLUE BADGE HOLDERS

Blue Badge holders are not automatically exempt from charges in off-street car parks as the parking concessions provided under the Blue Badge Scheme only apply to on-street parking. The basis of the blue badge scheme is for the mobility impaired to be able to park closer to their destination to reduce the walking distance from the car, rather than a financial obligation to reduce travel costs. The conditions of use of off-street facilities are therefore entirely down to the individual car park operator to determine if charges are to be applied, but if provided, disabled bays should be located prominently by the walking desire line exit.

A number of Local Authorities charge for blue badge off-street parking (e.g. Bath in B&NES) and some offer reduced tariffs (e.g. Yeovil in Somerset), though many offer free off-street parking. Cornwall currently offers free off-street parking for blue badges but is consulting on charging for their use. Exeter provides unlimited free off-street parking (except in Premier Pay on Foot sites) for valid Blue Badge holders.

PROMOTIONS AND ADVERTISING

Car parks offer a wide range of opportunities for advertising, sponsorship and cross-promotion, using both the physical assets and tickets and the ability to discount prices. Exeter currently offers:-

- Advertising opportunities on the rear of Pay & Display tickets
- Concessionary parking offers (eg Christmas and Independent Traders Day)
- Car cleaning services at Guildhall
- Catering franchise at Matford P&R

There is potential for other services to be provided in car parks: for example, advertising on ticket machines and hoardings; use of car parks for events; appropriate commercial activities such as car wash etc. Advertising on modern lit hoardings that are well maintained can also improve the amenity and perceived security, especially in multi-storey car parks.

Additionally, the City Council's car parks could support the local economy by offering local businesses or other key stakeholders the opportunity to offer their own incentives, such as product discounts or refunds, for parking outside of peak demand periods.

Key Parking Operations issues

- Exeter's long stay parking charges are significantly cheaper than comparable cities for shorter stays
- Exeter's parking charges do not discourage short stay users from using long stay car parks
- There are no short stay restrictions at long stay car parks or vice versa
- Unlike Exeter, most comparable cities charge for evening parking
- Parking demand is only marginally affected even with extreme increases in prices
- There is low demand for season tickets
- The current permit schemes do not maximise capacity in underused car parks

Car Park Condition and Development

The City's car parks have been assessed for ease of use, quality, dynamic capacity and general operation to give an objective comparison of their quality and condition.

John Lewis and Princeshay1 car parks scored *Very High,* with 13 more scoring *High*. These 13 include the remaining NCP car parks at Summerland Street and Market Street. Only five of the car parks scored as *Average,* with the rest *Good.*

Score	Car Park
Very High	John Lewis, Princesshay1
High	Guildhall, Princesshay3, Summerland, Howell Road, Market Street, Princesshay2, Holman Way, Mary Arches Street, Magdalen Road, Cathedral and Quay, Bamfylde Street, Triangle, Smythen Street
Good	Haven Banks, Matford P&R, Magdalen Street, Bystock Terrace, Bartholomew Terrace, Matthews Hall, Tappers Close, Richmond Road, Okehampton Street, Topsham Quay
Average	Belmont Road, Harlequins, Gordon's Place, Parr Street, King William Street

Of note is that the relatively new John Lewis car park scored the highest while the adjacent King William Street scored the lowest. Similarly, the Guildhall scored highly while the adjacent Harlequins scored low. The Council's three *Premium* car parks, John Lewis, Guildhall and Mary Arches Street fall into three different categories of score.

However, this assessment did not take account of qualitative aspects such as appearance, smell and ambience, though these were noted by the survey team. King William Street, Cathedral and Quay, Mary Arches Street and Harlequins were noted to fall short of what would be expected in terms of appearance and ambience. In addition, feedback from a number of stakeholders and car park users was that Cathedral and Quay in particular is under-utilised as a result of a perceived poor sense of security and unattractive environment.

Notably, improvements to Cathedral and Quay Car park could see a further 125 spaces being taken up on Saturday:

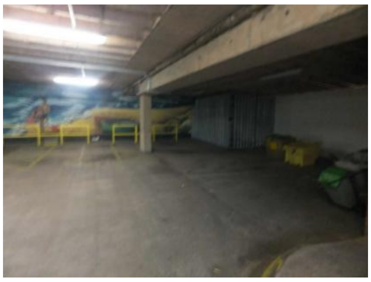
CAR PARK	Rank out of 30	Capacity	Saturday Capacity	Weekday Capacity
Mary Arches Street	10	470	90%	54%
Cathedral and Quay	12*	395	68%	54%
King William Street	30	244	86%	31%
Harlequins	27	91	92%	70%

Operating the car park surfaces, drainage, lighting, signage, painting and lining and equipment including pay and display / pay on foot machines; card readers; barrier systems; ANPR equipment; controlling software and operational links; cash collection; enforcement systems and so on, require significant investment as well as year on year maintenance to provide users with the level of service that they expect. To have a professionally functioning car park operation that can defend the tariff charged, it is essential that appropriate funding is available for on-going maintenance, refurbishment and renewal programmes. This justifies the cost of parking and should also reduce cross-centre travel and related congestion.

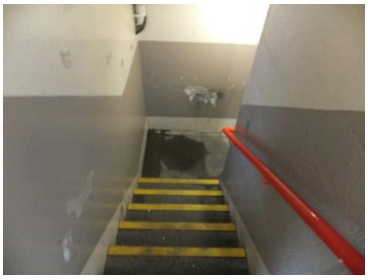
KING WILLIAM STREET CAR PARK

The car park is in a great location for accessing the City and St James' Park Football Stadium. The surface area of the car park is popular, however the underground area is unattractive and used as a last choice for parking within the car park. The outside of the car park section which leads off King William Street is unattractive to potential users and gives a 'run-down' atmosphere (Picture 1). The car park can be accessed from Leighton Terrace and King William Street. These entrances do not interlink efficiently with the one-way system and can been seen as confusing to new users. The signage for the car park along King William Street includes directions to the John Lewis Car Park which may add to King William Street's appearance as a 'second choice' destination. The design of the car park has created many dark 'shady' areas that add to the run down atmosphere (Picture 2). The staircases in the car park project an unattractive and intimating appearance and some car park users choose to walk up the car ramps instead which do not have pedestrian walkways and have poor visibility, making it dangerous for pedestrians (Picture 3).

Picture 1



Picture 2



Picture 3

CATHEDRAL AND QUAY CAR PARK

The car park is in a great location for visiting the Quay and is close to South Street for access to the City Centre. The car park is easily accessible for vehicles travel from the south of Exeter.

However, along the sloped vehicular entrance to the car park there is a help point box. There are no footways to the help point box and therefore it is dangerous to access. The help point box itself gives an old and damaged appearance and provides a negative 'run-down' image of the car park for entering vehicles (Picture 1). Old, unmaintained signage which is stained and consequently illegible adds to the 'run-down' atmosphere. Access between the levels of the car park is intimidating as the lift has graffiti and is dirty (Picture 2). Faded line markings have added to the negative atmosphere by making the car park appear 'dark and dirty'. Collisions can occur as users may be unable to read and follow the line markings (Picture 3).

Users report difficulty finding their way from the car park to the city centre and to the Quay. Improved pedestrian signage in and around the car park would improve this. It is also essential that wheelchair friendly routes from the car park are also clear signed and the city centre maps are legible.

Picture 1

Picture 2

Picture 3

MARY ARCHES STREET CAR PARK

The Mary Arches car park is in the ‘Premium’ tariff band of Exeter’s car parks however it does not match the level of service typical of a premium car park. The car park has many poor aspects which have reflected its weekday use of (54%).

The entrance for the car park can be confusing due to the array of signs that could be better arranged to be more targeted and less distracting. The line markings for the one-way system at some of the ramps between the levels have faded and are in need of maintenance (Picture 1). Refurbishments for staff storage areas are required instead of leaving items in the parking area (Picture 2). The ‘run-down’ atmosphere of the car park is showcased by graffiti (Picture 3). The lift between the different levels of the car park is not signposted and has a bad odour. The ticket machine shelter has been placed in front of the tariff board and City Centre map making it difficult to read.

Picture 1

Picture 2

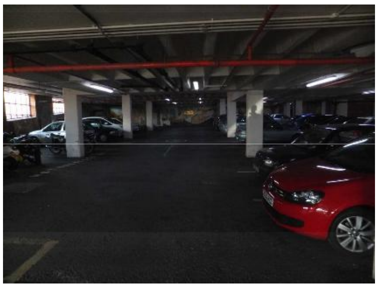
Picture 3

HARLEQUINS CAR PARK

The car park is located in a great location for shopping and other city centre activities.

The car park does not provide a welcoming image to entice visitors to the Harlequins Shopping Centre. The faded line markings at the entrance of the car park have added to the poorly maintained image. The underground area of Harlequins car park is poorly lit and are unattractive to users in the evenings. The help point box gives an old and damaged appearance and provides a negative ‘run-down’ image of the car park for entering vehicles,

Picture 1



Picture 2

Picture 3

DEVELOPMENT OPPORTUNITIES

Many authorities aim to reduce the stock of long stay car parks / favour short stay car parks to encourage commuters and longer stay journeys to travel on more sustainable modes of transport jointly meeting other objectives such as emissions and air quality. Prioritising short stay car parking encourages shoppers and leisure trips which benefits the local economy whilst not lessening congestion because the arrival and departure profiles are less concentrated. However, given that weekday capacity in Exeter’s city centre car parks is significant and only 29% of the carpark users currently stay for more than 5 hours, this is not a priority in terms of strategy or redevelopment.

Many of the council’s car parks have significant surface areas in prime sites in the city centre and could be considered for redevelopment. However, this must be balanced against the predictions of full capacity on Saturdays by 2018. Until shoppers and leisure users are shown to be shifting to alternatives to city centre parking on Saturdays, any proposals for redevelopment should consider replacement and even additional parking with decked or underground developments or alternative mitigation measures. The city council should also be mindful of potential loss of income as a result of private or joint venture re-development:

- Magdalen Road car park to the south of the centre offers a natural valley which could accommodate decking level(s) to allow both more parking capacity as well as easier pedestrian routes for less mobile drivers and passengers. However, the size of the car park is relatively small.

- Triangle car park to the south east and close to the proposed re-developed retail and leisure centre at the former bus and coach station offers a prime location for a higher quality multi-storey.

- Howell Road car park to the north of the centre is a large surface car park which has potential for decking over some of its area.

- Magdalen Street car park to the southwest of the centre is a smaller car park but its topography and surrounding buildings suggest a sensitively designed deck may not look out of place.

- At the moment the Revised 2015 SHLAA identifies part of the site at Mary Arches Car Park as being available and suitable for residential development.

Haven Bank car park operates at between 15 and 25% capacity during weekdays and could be considered for a partial re-development for other uses, or for regenerating the area. There are other uses within the car park, including coach parking and boat storage, and there are other issues which may prevent physical redevelopment but nevertheless in is an underused land resource which deserves consideration of alternative or dual use. This will be addressed further in the emerging Masterplan for the Water Lane Regeneration Area.

In addition, there may be potential for residential or commercial development above both the Cathedral and Quay and Leighton Terrace car parks, which may also offer the opportunity to increase the number of spaces.

Key Quality and Development issues

- Not all Premium car parks score highly in terms of quality
- The maximum use of Cathedral and Quay lags behind other car parks, suggesting that it is used as a final choice car park.
- City centre congestion could be ameliorated by investment in King William Street, Cathedral and Quay, Mary Arches Street and Harlequins car parks
- Triangle car park offers a prime location for a high quality multi- storey.

Signs and Influencing Infrastructure

SIGNS

Signage to car parks is part of Devon County Council's Parking Management Strategy. Highway signage requires the agreement and implementation of the local highway authority of Devon County Council, and if necessary, Highways England for the motorway and trunk road network surrounding Exeter (for Park and Ride signs etc.).

Car parking should be strategically sign-posted to:

- reduce traffic from entering the City Centre by encouraging use of the Park and Ride sites
- advise of the availability of City Centre spaces to help inform choice to use Park and Ride
- direct cars to the nearest suitable car park with available space closest to the route they travel in on to reduce cross centre traffic.

A review of traffic signs is required to ensure:

- P&R sites are easy to find
- Drivers are aware of any capacity or congestion issues in the City Centre in time to decide to divert to Park and Ride
- Drivers are aware of the capacity of City Centre car parks as they drive into the City
- Drivers are aware of the pricing differentials to inform their choice of car park
- Drivers are aware of the short and long stay options to inform their choice of car park

Improved signage is needed to help visitors navigate to and around the City Centre car parks. In particular, the current signage and information around Princesshay needs to be reviewed as drivers tend to queue when the car park is full rather than venturing further afield. The current Variable Message System is not trusted by users and needs attention.

In addition to signs, technology can be used to better communicate with users, for example computer and mobile phone applications that give real-time information on parking space availability, Park and Ride bus times, journey times into the city centre and even car park prices. These applications could also allow capture of and response to usage data and other customer feedback. Technology is poised and ready for the collection and analysis of behavioural data at scale and for seeking fresh insights into the complex issues which affect our future and Exeter is poised to do this through Exeter City Futures.

PARK AND RIDE AND RAIL

The Parking Strategy cannot accommodate the predicted demand for parking in central Exeter on Saturdays without a significant modal shift towards P&R as well as rail, bus, cycling and walking. The alternative of supressing demand through fiscal measures would require increasing tariffs beyond a potentially acceptable level of increase and far beyond that of comparable cities and towns.

The three existing Park and Ride (P&R) sites total 1,701 spaces:

- Honiton Road – 660 spaces
- Sowton – 590 spaces
- Matford – 451 spaces (8 disabled)

Two of are operated by Devon County Council with Matford operated by Exeter City Council (but with management to be taken over by Stagecoach as part of the relocation of their bus depot).

The use of Park and Ride grew significantly in its first four years, demonstrated by Devon County Council's study in 2009, with the likelihood of ongoing growth, helping reduce traffic levels in the city centre with associated reduced congestion, and noise and air quality benefits. Is 2009 the latest use figures we have?

Figure 12: Observed Growth in P&R 2004 to 2009 (Source DCC)

In addition four potential new Park and Ride sites have been considered:

- Alphington / Ide to serve the A30 West;
- Cranbrook to serve the A30 East;
- Cowley to serve the A337 and A396 to the North; and
- P&R within the South West Urban Extension

The Alphington / Ide Park and Ride (serving the A377 and A30) is the closest to being progressed and implemented and is at the preferred option stage. This proposal has been around for a number of years and has had setbacks through the planning process.

In addition, Devon County Council is beginning to develop a network of Park and Change sites where motorists park and switch to another mode such as bicycle or conventional bus service.

The background analysis demonstrates sufficient likely demand from commuters and leisure / shopping trips and shows reduced traffic flows and congestion leading the centre should it be progressed. Provision of additional Park and Ride sites will help with the predicted over-capacity issues on Saturdays and will align well with Exeter's Vision and associated policies and strategies.

Rail stations have recently opened at the significant development at Cranbrook to the west of Exeter, as well as at Newcourt. Further new stations are proposed at Marsh Barton, and much more distantly at Edginswell in Torquay. These proposed new stations and associated rail services are welcomed as they encourage the use of non-car travel and accord well with the strategic objectives to reduce congestion and other measures to improve noise and air quality in central Exeter.

Key Signage issues

- Improved signage is needed to help visitors navigate to and around the City Centre car parks
- the current signage and information around Princesshay needs to be reviewed
- real-time information on parking space availability, Park and Ride bus times and journey times into the city centre needs to be improved and developed

Areas for Strategic Intervention

Analysis of the preceding information, data and stakeholder feedback demonstrates that the Council's four strategic objectives – encouraging economic growth, maximising capacity, reducing congestion and maintaining income - can be met with the following interventions:

1. **PRICING AND TARIFF STRUCTURE**

The issues of over-capacity on Saturdays and under capacity during the remainder of the week can be addressed in part by revising the tariff structure, mindful that demand for car parking is relatively inelastic and will have a limited effect in this respect. However, Exeter City Council manages by far the largest share of public parking provision in central Exeter and therefore can lead and influence parking competitors, especially in terms of tariff. It is likely that alterations to tariffs will generate a ripple effect to other providers to similarly alter their tariffs.

There is a perception that the existing pricing structure discourages dwell time because most users tend to park for up to three hours. A linear tariff would be simpler for users to understand and may encourage more use of top-up type payments through mobile phones. The designation and tariff relating to Long Stay parking should apply to car parks where the majority of users park for longer stays, with a minimum stay tariff of 3 hours. Where there is an abundance of shorter stay parking within a car park then the designation and tariff should be reconsidered.

There is also a perception that prices are generally too expensive, although this is not bourne out by comparison to other similar city offers.

A revised pricing and tariff structure can address the key strategic objective of economic growth by encouraging more shoppers and leisure users into the City, increasing the duration of stay and evening use. It can also address congestion by having pricing differentials between central and more peripheral car parks and by encouraging use of alternatives to city centre parking. However, any revised pricing and tariff structure must have at least a neutral effect on income from car parking. Any additional income gained as a result of changes to demand or tariffs should be reinvested into car park infrastructure or other interventions identified in this strategy.

Recommended actions on pricing and tariffs:

- Introduce a revised pricing and tariff structure that removes the disincentive to park for more than three hours, removes the 1 hour only tariff, increases the duration of stay, reinforces the distinction between Short-Stay and Long-Stay and creates pricing differentials between central and more peripheral car parks;
- Consider increasing the tariff differential between Saturdays and weekdays;
- Remove the financial incentive for short stay users to park in designated Long Stay car parks by matching the tariff to Short Stay for shorter stay users;
- Re-designate Topsham Quay to a medium/long stay car park rather than short stay to serve recreational users
- Consider internet based pre-booking to compete with the existing NCP offer
- Consider a pre-pay card scheme with the potential to be used for parking, public transport and P&R
- Increase the proportion of parking payments made by phone and card
- Work with Devon County Council so that on and off street parking can be managed as one overall supply

2. EVENING OPENING TIMES AND CHARGES

There is a great deal of variation currently in evening opening hours and the inconsistency is confusing. City Centre car parks and the Park & Ride services need to open later especially for seasonal peaks and late night shopping days. Car parks (particularly multi-storeys and underground facilities) feel less welcoming at night, especially for women. Single evening tariffs are most effective for evening/overnight use and should be based on recovering safety improvements and operational costs.

Improving the evening offer in terms of car parking will support the objectives of economic growth and offers the opportunity to increase income for reinvestment into city centre parking services. Where possible, promotions should be designed to encourage users to drive in to the city outside peak times, and/or stay on at the end of the working day, to complement other measures to mitigate peak hour congestion.

Recommended actions on evening opening and charges:

- Specifically promote evening parking at designated car parks;
- Prioritise implementation of measures to improve perceptions of safety and security at designated car parks;
- Consider charging for evening parking acting as a premium product providing safety and security, competing against free alternatives;

- Encourage operators of Exeter's Park & Ride services to open later especially for seasonal peaks and late night shopping days

3. REVIEW SEASON TICKETS AND PERMITS FOR BUSINESSSES AND RESIDENTS

The current portfolio of permits is inconsistent with the objectives of this strategy. Both the prices and the designated parking areas mean that issues of expensive, high demand spaces are potentially filled by cars paying far below the nominal tariff rate for them. In addition, they exacerbate the issue of over-capacity on Saturdays. Moreover, they are not particularly well used and if demand increases they will have an even greater impact. Reviewing the portfolio will address the strategic objectives of capacity, city centre congestion and maintaining income for the council.

Recommended actions on season tickets and permits:

- Review the car parks eligible for season ticket, business permit and residents permit parking to increase Saturday shopping capacity and encourage commuters to take up spare capacity on weekdays;
- Review the number, cost and eligibility of permits to remove the inconsistencies in pricing, reflect demand for city centre spaces and attract more long-stay parking to car-parks with low weekday use
- Review Blue Badge parking areas and payment
- Introduce residents' parking permits for Topsham car parks, prioritising those without house frontage;
- Consider allowing long stay durations of several days at Tappers Close for those travelling away to compliment the adjacent railway station

4. CAR PARK CONDITION AND DEVELOPMENT

There is evidence that the quality of some car parks is deterring use and that has implications for all four strategic objectives: economic growth, capacity, income and congestion. Exeter's car parks (particularly multi-storeys and underground facilities) feel unwelcoming, especially for women and in the evenings. Those more centrally located car parks that do not attract the same level of custom are generally in poorer condition and in need of a facelift and not all Premium car parks score highly in terms of quality. The maximum use of Cathedral and Quay lags behind other car parks, suggesting that it is used as a final choice car park. Providing car parks of comparable quality around the city makes drivers more likely to park in the nearest, most convenient car park to them. Specifically city centre congestion could be ameliorated by investment in King William Street, Cathedral and Quay, Mary Arches Street and Harlequins car parks. Some car parks with significant surface areas could be considered for redevelopment.

The car park portfolio derives around £6m in income for the Council. Of this, £3.8M is earned from the multi-storey car parks of John Lewis, King William Street, Leighton

Terrace, Mary Arches Street, Guildhall, Harlequins, Princesshay 2, Princesshay 3 and Cathedral and Quay. Largely of concrete construction, with maximum spans and minimum supports, and subject to constant changes in load cycles as well as cycles of wetting and drying and differential temperatures, multi-storey car parks have a far greater risk of cracking and long-term deflections than other building structures. The City's oldest multi-storey car parks are almost 50 years old and a structural survey, with an associated investment programme, is recommended to ensure this critical income stream is maintained.

Recommended actions on car park condition and development

- Undertake a structural and condition survey of all multi-storey car parks in the city
- Develop a Car Park Investment Strategy, prioritising improvements to Mary Arches Street, Cathedral and Quay and King William Street
- Commission a feasibility study and business case for the development of a multi-story car park on the existing Triangle car park
- Consider Haven Banks car parks redevelopment possibilities in the context of the development of a Masterplan for the Water Lane Regeneration Area.
- Consider changing the access of Princesshay2 to Paris Street to reduce queueing on Paris Street
- Review demand for electric vehicle charging points
- Improve cleaning standards
- Consider the business case for attended car parks
- Consider offering a choice of wider spaces in some car parks

5. SIGNAGE

Signage helps visitors navigate to and around the City Centre car parks and real-time information on parking space availability, Park and Ride bus times, journey times into the city centre helps both residents and visitors alike determine the most suitable car park for their needs. Well placed, effective signage and live information can influence decisions and by doing so can address two of the strategic objectives, namely capacity and congestion.

Modern technology and data analytics can dramatically improve the efficiency of the way people and vehicles move around a city. An innovative approach to transportation will reduce congestion, shorten journey times, improve air quality, make people healthier and lower environmental impact.

Recommended actions on signage

- Review the directional signage into and around the City Centre to encourage drivers to find the nearest suitable car park with available space closest to the route they travel in on and reduce cross centre traffic.

- Prioritise the review of signage and information around Princesshay and Topsham
- Improve pedestrian signage in and around Cathedral and Quay car park
- Ensure that city centre pricing differentials are clear on directional signage
- Improve the current Variable Message System or consider a better alternative
- Improve real-time information on parking space availability, Park and Ride information and journey times into the city centre
- Consider commissioning the development of a Smartphone app. for real time parking and traffic information in the City Centre

6. INCREASE THE NUMBER OF OFF STREET PARKING SPACES IN THE CITY CENTRE AND TOPSHAM

With the City Centre at capacity on Saturdays from 2018 and increasing pressure on spaces in Topsham opportunities to increase the number of parking spaces should be taken wherever possible. This will address the strategic objectives of economic growth, capacity and income. The impact on congestion will need to be carefully considered and location will be a key element for consideration.

Recommended actions on increasing spaces

- Consider options for increasing city centre off-street parking, particularly in North and West Zones, including the potential for a multi-storey car park on the existing Triangle surface car park
- Consider feasibility and business case for extra off-street parking in Topsham

7. OFFER PARKING PROMOTIONS WITH RESTAURANTS AND RETAILERS

At present, the only promotions City Council are Christmas discount promotions designed to encourage shoppers to the city and to encourage longer stays once parked. This addresses the strategic objectives of economic growth and capacity, where intelligently applied. Clearly discount promotions may negatively affect income so any offers must also be assessed against this objective.

Recommended actions on promotions

- Consider the feasibility and business case for specific off-peak parking promotions by the City Council, particularly where these might serve to address capacity issues on Saturdays and / or assist with further establishing the ’18 hour economy’
- Consider how businesses could offer their own promotions to encourage off peak and evening parking
- Consider introducing a loyalty card scheme for parking
- Consider advertising on ticket machines, hoardings and back of tickets; use of car parks for events; appropriate commercial activities such as car wash etc.

8. SUPPORT THE LOCAL TRANSPORT AUTHORITY TO ENCOURAGE THE USE OF ALTERNATIVE FORMS OF TRAVEL INTO THE CITY CENTRE

Policy interventions outside of parking provision are needed to encourage leisure and shopping trips to use other modes of travel on Saturdays including P&R, rail, buses, cycling and walking. While it is recognised that these are largely outside the scope of this strategy, Saturday capacity issues may dissuade people from choosing Exeter as a retail and leisure destination. These actions will address the strategic objectives of congestion and allow for economic growth of the city centre if Saturday parking capacity is not sufficiently addressed.

Recommended actions on alternative to city centre parking

- Market existing P&R sites to increase the share of commuter and leisure trips
- Support the provision of additional P&R sites
- Encourage people making leisure and shopping trips to use other modes of travel particularly on Saturdays including P&R, rail, buses, cycling and walking.
- Explore the ability of CIL to fund actions that mitigate city centre traffic growth and/or loss of parking and by encouraging use of alternatives to city centre parking

Action Plan

1. REGULATORY

PARKING STRATEGY ACTION	LEAD	DATE
Introduce a revised pricing and tariff structure	Public Realm	September 2016
Re-designate Topsham Quay to a medium/long stay car park rather than short stay to serve recreational users	Public Realm	September 2016
Consider charging for evening parking	Public Realm	September 2016
Review the car parks eligible for season ticket, business permit and residents permit parking	Public Realm	September 2016
Review the cost and eligibility of parking permits	Public Realm	September 2016
Review Blue Badge parking areas and payment	Public Realm	September 2016
Introduce residents' parking permits for Topsham car parks	Public Realm	September 2016
Consider allowing long stay durations of several days at Tappers Close	Public Realm	September 2016

2. PHYSICAL IMPROVEMENTS

PARKING STRATEGY ACTION	LEAD	DATE
Improve cleaning standards	Public Realm	June 16
Review demand for electric vehicle charging points	Public Realm	September 16
Improve pedestrian signage in and around Cathedral and Quay car park	Public Realm	September 17
Undertake a structural and condition survey of all multi-storey car parks in the city, together with an assessment of their development capacity	Corporate Property	March 17
Develop a Car Park Investment Strategy, prioritising aesthetic improvements to Mary Arches Street, Cathedral and Quay and King William Street	Corporate Property	November 17

3. SERVICE IMPROVEMENTS

PARKING STRATEGY ACTION	LEAD	DATE
Specifically promote evening parking at designated car parks	Public Realm	April 16
Consider introducing a loyalty card scheme for parking	Public Realm	April 16
Consider the feasibility and business case for specific off-peak parking promotions by the City Council	Public Realm	January 2017
Consider the business case for attended car parks	Public Realm	April 17
Consider internet based pre-booking to compete with the existing NCP offer	Public Realm	April 17
Consider introducing a pre-pay card scheme for parking	Public Realm	April 17
Improve real-time information on parking space availability, Park and Ride information and journey times into the city centre	Public Realm	2018
Increase the proportion of parking payments made by phone and card	Public Realm	Ongoing
Consider how businesses could offer their own promotions to encourage off peak and evening parking	Public Realm	Ongoing
Consider advertising on ticket machines, hoardings and back of tickets; use of car parks for events; appropriate commercial activities such as car wash etc.	Public Realm	Ongoing

4. PARTNERSHIP IMPROVEMENTS

PARKING STRATEGY ACTION	LEAD	DATE
Explore the ability of CIL to fund actions that mitigate city centre traffic growth and/or loss of parking	City Development	June 16
Work with Devon County Council to manage on and off street parking as one overall supply	Public Realm	September 16
Encourage operators of Exeter's Park & Ride services to open later especially for seasonal peaks and late night shopping days	City Development	December 17
Review and implement improvements to the directional signage into and around the City Centre	Public Realm with DCC	September 17
Improve the current Variable Message System or consider a better alternative	Public Realm with DCC	September 17
Market existing P&R sites to increase the share of commuter and leisure trips	Economy and Tourism	Ongoing
Encourage people making leisure and shopping trips to use other modes of travel particularly on Saturdays	Economy and Tourism	Ongoing

Work with Exeter City Futures to design innovative solutions and re-imagine the City for the future	Public Realm	Ongoing

5. LONGER TERM PROJECTS

PARKING STRATEGY ACTION	LEAD	DATE
Consider changing the access of Princesshay2 to Paris Street to reduce queueing on Paris Street	City Development	2019
Consider options for increasing city centre off-street parking, particularly in North and West Zones, including the potential for a multi-storey car park on the existing Triangle surface car park	Corporate Property	2019
Consider offering a choice of wider spaces in some car parks	Public Realm	2019
Consider feasibility and business case for extra off-street parking in Topsham	Corporate Property	2019

Measures

The effectiveness of any strategic approach can only be judged by collecting data on a range of measures. While there is a great deal of operational data available on parking, the following key areas will be collected and reported on for the purposes of this strategy. The measures highlighted in bold are the key strategic performance measures.

ECONOMIC GROWTH

1. **Dwell time: average ticket time purchased**
2. **Sunday parking demand : Sunday footfall as a % of Saturday footfall**
3. Evening parking demand : number of tickets sold after 6pm
4. Weekday parking demand : number of tickets sold Monday – Friday

CAPACITY

5. **Model shift : number of P&R tickets purchased on Saturdays**
6. Peak Saturday capacity : % of bays sold at 1pm
7. Weekday long stay demand : tickets of 7 hours and over sold on weekdays
8. Weekday long stay demand : number of season tickets issued

CONGESTION

9. Traffic volumes and speeds at peak hours (1pm Sat and 8.30am/5.00pm Mon – Fri)

INCOME

10. Overall Parking income
11. Proportion of parking payments made by cash, phone and card

Measures Baseline – January 2016

ECONOMIC GROWTH

1. **Sunday parking demand : Sunday footfall as a % of Saturday footfall was 52% in November 2015**
2. **Dwell time: average ticket time purchased during January 2016:**
    - **Premium: 2 hrs 15 mins**
    - **Short Stay: 3 hrs 56 mins**
    - **Long Stay: 6 hrs 18 mins**
3. Evening parking demand : number of tickets sold after 6pm during January 2016 was 3,634
4. Weekday parking demand : number of tickets sold Monday – Friday during January 2016 was 113,817

CAPACITY

5. **Model shift : number of P&R tickets purchased on Saturdays during January 2016 was Tbc**
6. Peak Saturday capacity : % of bays sold at 1pm during January 2016 was 79%
7. Weekday long stay demand ; tickets of 7 hours and over sold on weekdays during January 2016 was 4,992
8. Weekday long stay demand : number of 'live' season tickets issued as at 31st January 2016 was 304

CONGESTION

9. Traffic volumes and speeds at peak hours (1pm Sat and 8.30am/5.00pm Mon – Fri) Tbc

INCOME

10. Overall Parking income during January 2016 was £514,570
11. Proportion of parking payments made by cash, phone and card during January 2016 was cash 83.9%, card 12.7% and phone 3.4%

REPORT TO SCRUTINY COMMITTEE ECONOMY / EXECUTIVE
Date of Meeting: 3 March 2016 / 15 March 2016
Report of: Corporate Manager Property
Title: South Street / Corn Exchange Regeneration

Is this a Key Decision?

No
* One that affects finances over £1m or significantly affects two or more wards. If this is a key decision then the item must be on the appropriate forward plan of key decisions.

Is this an Executive or Council Function? Council

1. What is the report about?

This report sets out the need to review the future place of South Street and the Corn Exchange block in the city and seeks approval to commence this review and put in place initial funding to resource the projects.

2. Recommendations:

That Executive approve the commencement of a review of South Street and the Corn Exchange block and an initial resource of £75,000 to progress the projects.

3. Reasons for the recommendation:

South Street is an important part of the City which is changing as the city centre changes. We must look to ensure that these changes are positive if it is to play a revived role in the city centre offer.

The street needs to create its own identity and clarify its function. Potentially it can act as a bridge between the city centre and the Exeter Quay. The area can potentially provide an environment for a thriving independent sector as well as for exploring green initiatives and projects linked to the Exeter City Futures programme.

To begin to address these issues and plan the future of the area a comprehensive assessment of the areas constraints and opportunities will need to be carried out, linking into the City Centre Strategy.

This comprehensive analysis would enable the City Council to explore options in areas such as improved signage, parking, public transport, enhanced public realm and the creation of a “draw” to encourage visitors into South Street and on to the Quay.

The Corn Exchange block sits adjacent to South Street, forming a critical link between South Street and Fore Street. This has been a key trading and entertainment venue for a long time but we need to explore how it can respond to current leisure and retail requirements. The occupational lease agreements in the block are due to come to an end in 2020 which presents an opportunity to carry out a fundamental review of the asset and the functions it performs. This can be carried out as part of an examination of the need for a new performance venue in Exeter and whether the current building or its site has a role to play in meeting any such requirement.

4. What are the resource implications including non-financial resources.

The initial funding requirement is for £75,000 to enable the engagement of consultants to assist with the necessary analysis and reviews. Once approved the funding will be added to the 2016/17 budget.

5. Section 151 Officer comments:

Once approved the funding will be added to the 2016/17 budget.

6. What are the legal aspects?

Obviously securing a consultant will have to be in accordance with the Council's Contract Standing Orders. Otherwise, no other legal issues identified.

7. Monitoring Officer's comments:

This report raises no issues to concern the Monitoring Officer.

8 How does the decision contribute to the Council's Corporate Plan?

It is anticipated that the development of identity and concrete proposals for South Street and the Corn Exchange block will allow for the strengthening of this part of the city centre and create a positive environment for investment.

9. What risks are there and how can they be reduced?

At this stage of analysis and assessment there are no significant risks.

10. What is the impact of the decision on equality and diversity; health and wellbeing; safeguarding children, young people and vulnerable adults, community safety and the environment?

No such impacts have been identified at this stage. Proper consultation with stakeholders should ensure that these issues are fully addressed in due course.

11. Are there any other options?

A review of these areas could be deferred but it is felt that the need to address the issues is becoming increasingly pressing.

Michael Carson
Corporate Manager Property

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

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EXETER CITY COUNCIL

REPORT TO: SCRUTINY COMMITTEE - ECONOMY
DATE OF MEETING: 3 MARCH 2016
REPORT OF: ASSISTANT DIRECTOR FINANCE
TITLE: BUDGET MONITORING REPORT TO 31 DECEMBER 2015

Is this a Key Decision?
No

Is this an Executive or Council Function?
Council

1. What is the report about?
This report advises Members of any material differences to the revised budget in respect of the Economy Services revenue and capital budgets.

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. Recommendations:
That Members of Scrutiny Committee – Economy note the content of this report in order to be satisfied that prudent steps are being taken to address the key areas of budgetary pressure highlighted in this report.

3. Reasons for the recommendation:
Local authorities have a statutory duty to set and monitor their budgets during the year and to take any actions necessary because of potential overspending or potential shortfalls in income. Members are therefore presented with a quarterly financial update in respect of Economy Services.

4. What are the resource implications including non financial resources
The financial resources required to deliver Economy Services during 2015/16 are set out in the body of this report.

5. Section 151 Officer comments:
This report has been prepared on behalf of the Section 151 Officer to set out the projected financial position of Economy Services as at 31 March 2016.

6. What are the legal aspects?
Part 2 of the Local Government Act 2003 provides the legislative framework for the process of setting and managing budgets. In particular, Section 28 of the 2003 Act requires local authorities to monitor their budgets during the financial year.

7. Monitoring Officer's comments:
This report raises no issues for the Monitoring Officer.

8. Report Details:

Economy Services Budget Monitoring to 31 December 2015

8.1 **Key Variations from Budget**
The current forecast suggests that net expenditure for this committee will decrease from the revised budget by a total of £1,029,704 after transfers from reserves and revenue contributions to capital, as detailed in Appendix 1. This represents a variation of 104.36% from the revised budget. This includes supplementary budget of £837,460 already agreed by Council.

8.2 The variations by management are detailed in the table in 8.4. However, 40% of the underspend is in respect of the property maintenance and asset improvement and maintenance budgets. 8.3 provides detailed reasons for this significant underspend.

8.3 Budgets in respect of asset maintenance and improvement and the property maintenance fund are included in various management units in this, and other committees. Elements of these budgets are projected to be underspent by a total of £545,000 of which £416,330 sits within this committee. The points below provide details of the underspend:

- Key initial objectives of the Corporate Property restructure were to mitigate inefficient spending. As a result, only priority works have been undertaken in year. With the restructure now partially implemented, correctly prioritised spend has commenced so a more realistic spend profile will be seen from this point forward.

  To ensure that works postponed during this phase can be delivered a request will be made to roll forward **£310,000** in order to deliver a variety of schemes such as Civic Centre toilet refurbishment; Car Park Structural Repairs; Corn Exchange staff toilet improvements; and Civic Centre heating system component overhaul and optimisation.

- The budget for historic building decoration works and property condition surveys will not be spent. The works have been delayed due to ensuring the successful completion of the Livestock Centre re-roofing project. The schemes are in the process of being procured and will be delivered in 2016-17. Therefore, a request will be made to roll forward **£185,000** and **£50,000** respectively.

8.4 The significant variations (excluding those in 8.3) by management are:

MU Code	Management Unit	Over / (Underspend)	Detail
83A1	Estates Services	£23,840	• Non Domestic Rates expenditure expected to exceed the budget. • Income from South Street and Guildhall shopping centre anticipated to be less than budget. • Pay budget anticipated to underspend. • Asset Improvement and Maintenance contingency and lease repair budgets expected to underspend. • Property insurance costs will be less than the annual budget.

MU Code	Management Unit	Over / (Underspend)	Detail
83A3	Car Parking	(£206,710)	• Income from Off Street parking fees expected to exceed budget. • Underspend anticipated on pay and transport budgets. • Additional expenditure anticipated in respect of equipment tools and materials, pay by phone and credit card transaction fees.
83A4	Economic Development	£118,740	• Following the secondment of the Assistant Director Economy on 1 July 2015, his pay costs will be charged entirely to this unit. This will result in salary savings in the services which previously bore his costs, partially offset by honoraria paid to the acting managers. • The unit has an apprentice for which there is no budget; however there are savings elsewhere in the Council where apprentices are no longer employed. • These additional costs are partially offset by a net saving following the deletion of the City Centre Management service. • The net expenditure on the Rugby World Cup is expected to exceed the budget by £75,000. A report to Scrutiny Committee – Economy on 22 January 2016 gave members an update on this event.
83A9	Building Control	(£70,070)	• Income from Local Land Charges expected to exceed the budget.
83B4	Engineering and Construction Services	(£32,710)	• Pay budgets expected to underspend.
83B5	Planning Services	£30,270	• Income from planning applications anticipated to exceed the budget. • Pay budgets expected to underspend. • Consultant fees expected to significantly overspend, partly offset by transfer from Local Development Framework reserve. • Recharge from Environmental Health for work carried out expected to exceed budget.
83B8	Major Projects	£45,000	• The budget funds the legal team and property consultants engaged to deliver the property transactions required to bring forward the Bus & Coach Station redevelopment. This work has ramped up this year and the initial budget was inadequate to meet these demands.

MU Code	Management Unit	Over / (Underspend)	Detail
83B9	Markets & Halls	(£31,024)	• Additional income is anticipated from car storage and lettings at the Livestock Centre. • Utility costs at the Corn Exchange are expected to be less than the estimates. • Non Domestic Rates expenditure expected to be less than the budget.
83C3	Contracted Sports Facilities	(£317,720)	• As a result of the sports facilities contractor acquiring charitable status, the income receivable under the contract will increase. • The impact of reduced energy costs for the current and previous years has now been agreed with the contractor, leading to a refund of amounts previously paid and a reduction in the ongoing charges.
83C5	Corporate Property Maintenance	(£308,900)	• The Property Maintenance Fund budget is expected to underspend. A request to carry forward the budget underspend will be made at year end. • Pay budgets are anticipated to underspend due to vacancies.

9. Capital Budget Monitoring to 31 December 2015

To advise members of the financial performance in respect of the 2015/16 Economy Capital Programme.

9.1 **Revisions to the Economy Capital Programme**

The 2015/16 Capital Programme, including commitments brought forward from 2014/15 was last reported to Scrutiny Committee – Economy on 10 September 2015. Since that meeting the following changes have been made to the programme:

Description	£	Approval/Funding
Capital Programme, as reported to Scrutiny Committee – Economy, 12 November 2015	**4,730,980**	
Budget Deferred to 2016/17 at Quarter 2	(22,880)	Approved by Council on 15 December 2015
Overspends/(Underspends) reported at Quarter 2	(36,340)	
Revised Capital Programme	**4,671,760**	

9.2 **Performance**
The current Economy Capital Programme is detailed in Appendix 2. The appendix shows a total spend of £2,246,887 in the first nine months of 2015/16 with £398,098 of the programme potentially deferred to 2016/17.

9.3 **Capital Variances from Budget**
No significant variances or issues concerning expenditure have arisen for this committee.

9.4 **Capital Budgets Deferred to 2016/17**
Schemes which have been identified as being wholly or partly deferred to 2016/17 and beyond are:

<table>
<tr><th>Scheme</th><th>Revised 15/16 Budget £</th><th>Budget to be Deferred £</th><th>Reason</th></tr>
<tr><td>RAMM Shop</td><td>68,000</td><td>65,500</td><td>The shop is now expected to open in late May due to delays with the procurement process.</td></tr>
<tr><td>City Centre Enhancements – TV Screens</td><td>40,000</td><td>40,000</td><td>Delays have resulted from an in-depth look at the project. Initially, one large screen was planned now it has been agreed that 5 or 6 smaller screens will have more impact.</td></tr>
<tr><td>Newtown Community Centre (1st Grant)</td><td>50,000</td><td>50,000</td><td rowspan="2">The group are still trying to raise sufficient funding from other sources before the scheme can go ahead.</td></tr>
<tr><td>Newtown Community Centre (2nd Grant)</td><td>49,000</td><td>46,750</td></tr>
<tr><td>Countess Wear Village Hall</td><td>75,000</td><td>75,000</td><td>Work is likely to start on site in April 2016.</td></tr>
<tr><td>Alphington Village Hall</td><td>50,000</td><td>50,000</td><td>The group are still fundraising elsewhere before the project can go ahead.</td></tr>
</table>

10. How does the decision contribute to the Council's Corporate Plan?
Economy Service budgets contribute to 3 key purposes, as set out in the Corporate Plan; keep me/my environment safe and healthy, keep place looking good, help me find somewhere to live.

11. What risks are there and how can they be reduced?
Areas of budgetary risk are highlighted in this report. The key areas of budgetary risks within Economy Services are attached as Appendix 3, for reference.

12. What is the impact of the decision on equality and diversity; health and wellbeing; safeguarding children, young people and vulnerable adults, community safety and the environment?
No impact

13. Are there any other options?
No

DAVE HODGSON
Assistant Director Finance

FINANCIAL SERVICES TEAM

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

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APPENDIX 1

SCRUTINY COMMITTEE - ECONOMY
BUDGET MONITORING

APRIL 2015 TO DECEMBER 2015

ACTUAL TO DATE					YEAR END FORECAST				
PROFILED BUDGET	ACTUAL TO DATE	VARIANCE TO DATE	CODE		APPROVED BUDGET	CURRENT OUTTURN FORECAST	FORECAST VARIANCE	QTR 2 FORECAST VARIANCE	QTR 1 FORECAST VARIANCE
£	£	£			£	£	£	£	£
(2,536,285)	(2,559,765)	(23,480)	83A1	PROPERTY & ESTATES SERVICES	(2,527,060)	(2,503,220)	23,840	83,820	45,000
33,149	39,024	5,875	83A2	TRANSPORTATION	44,090	45,490	1,400	0	0
(4,048,798)	(4,503,466)	(454,668)	83A3	PARKING SERVICES	(5,265,710)	(5,472,420)	(206,710)	(114,200)	(7,500)
567,510	615,563	48,053	83A4	ECONOMIC DEVELOPMENT	851,180	969,920	118,740	45,610	45,610
131,389	145,666	14,277	83A5	ARTS & EVENTS	196,750	193,120	(3,630)	(7,280)	2,120
242,829	235,505	(7,324)	83A6	TOURIST INFORMATION	384,870	396,110	11,240	0	0
46,825	36,776	(10,049)	83A8	DISTRICT HIGHWAYS & FOOTPATHS	43,000	41,000	(2,000)	0	0
(67,931)	(144,791)	(76,860)	83A9	BUILDING CONTROL	43,980	(26,090)	(70,070)	3,000	0
52,040	65,331	13,291	83B1	LAND DRAINAGE	52,040	52,040	0	0	0
65,715	21,415	(44,300)	83B4	ENGINEERING & CONSTRUCTION SERVICES	0	(32,710)	(32,710)	0	0
776,172	620,414	(155,758)	83B5	PLANNING SERVICES	963,390	993,660	30,270	21,170	96,730
39,600	21,889	(17,711)	83B6	CONSERVATION	56,110	50,110	(6,000)	(6,000)	0
0	(9,204)	(9,204)	83B7	AFU	0	7,500	7,500	11,420	4,450
22,500	61,022	38,522	83B8	MAJOR PROJECTS	30,000	75,000	45,000	0	0
(352,758)	(627,739)	(274,981)	83B9	MARKETS & HALLS	(433,900)	(464,924)	(31,024)	(62,930)	(45,620)
33,677	54,642	20,965	83C1	WATERWAYS	61,770	52,480	(9,290)	0	0
1,449,060	1,362,387	(86,673)	83C2	MUSEUM SERVICE	2,258,140	2,247,700	(10,440)	(800)	2,500
541,569	96,094	(445,475)	83C3	CONTRACTED SPORTS FACILITIES	1,455,910	1,138,190	(317,720)	(220,000)	(220,000)
(21,719)	(43,148)	(21,429)	83C4	PROPERTIES	(23,810)	(15,070)	8,740	4,790	9,500
200,243	(128,356)	(328,598)	83C5	CORPORATE PROPERTY MAINTENANCE	334,490	25,590	(308,900)	0	0
1,371,472	1,321,820	(49,652)	83PRAE	PUBLIC REALM ASSETS	1,924,640	1,924,640	0	9,880	(6,380)
			83C6	CORPORATE ENERGY TEAM	0	13,610	13,610	0	0
(1,453,742)	**(3,318,923)**	**(1,865,180)**		**NET EXPENDITURE**	**449,880**	**(288,274)**	**(738,154)**	**(231,520)**	**(73,590)**
407,117	142,980	(264,137)		ASSET IMPROVEMENT & MAINTENANCE BUDGETS	536,830	330,500	(206,330)	0	0
(1,046,626)	**(3,175,943)**	**(2,129,317)**		**REVISED NET EXPENDITURE**	**986,710**	**42,226**	**(944,484)**	**(231,520)**	**(73,590)**

VARIANCES ON TRANSFERS TO / (FROM) EARMARKED RESERVES	
83B5 - Local Development Framework	(22,720)
83B7 - AFU Archives & Boxing	(7,500)
83C2 - Museum Service	(55,000)
OVERALL FORECAST EXPENDITURE FOR THE YEAR AFTER MOVEMENTS TO/FROM RESERVES	**(42,994)**
REVISED BUDGETS	**986,710**
ADJUSTED OUTTURN VARIANCE	**(1,029,704)**

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CAPITAL MONITORING TO 31 DECEMBER 2015

	2015/16 Capital Programme	2015/16 Spend to 31 December	2015/16 Forecast Spend	2015/16 Budget to be Carried Forward to 2016/17 and Beyond	2015/16 Programme Variances (Under)/Over
	£	£	£	£	£
ECONOMY					
KEEP PLACE LOOKING GOOD					
Exhibition Way Bridge Maintenance	39,980	400	39,980		
Canal Bank Repairs & Strengthening	1,060		1,060		
National Cycle Network	4,500	4,500	4,500		
Repair to Turf Lock Gates	145,320	1,080	145,320		
Repair Canal Bank at M5	60,000	15,451	60,000		
Cathedral Yard - Replace Street Lighting	20,000	5,601	20,000		
Replace Car Park Ticket Machines	200,000		200,000		
Phoenix - Replace Air Conditioning Units	30,000		30,000		
PROVIDE GREAT THINGS FOR ME TO SEE & DO					
Replace Running Track at Exeter Arena	205,720	159,879	205,720		
Sports Facilities Refurbishment	67,000	29,164	67,000		
RAMM Development	382,380		382,380		
Passenger Lift at RAMM	45,000		45,000		
RAMM Shop	68,000	2,500	2,500	65,500	
Storage of Archives	11,020	5,002	5,002		(6,018)
Livestock Market Electrical Distribution Boards	12,650	5,933	5,933		(6,717)
Livestock Centre Roof Replacement	1,250,000	1,014,803	1,250,000		
City Centre Enhancements - TV Screens	40,000			40,000	

APPENDIX 2

CAPITAL MONITORING TO 31 DECEMBER 2015

	2015/16 Capital Programme	2015/16 Spend to 31 December	2015/16 Forecast Spend	2015/16 Budget to be Carried Forward to 2016/17 and Beyond	2015/16 Programme Variances (Under)/Over
	£	£	£	£	£
DELIVER GOOD DEVELOPMENT					
Newcourt Community Hall (S106)	10,000	765	765	9,235	
Newcourt Community Hall (Grant)	36,240			36,240	
Newtown Community Centre (1st Grant)	50,000			50,000	
Newtown Community Centre (2nd Grant)	49,000	2,250	2,250	46,750	
Countess Wear - Village Hall	75,000			75,000	
Beacon Heath Martial Arts & Boxing Club - New Roof	21,810	1,000	21,810		
Devonshire Place (Landscaping)	13,690	10,634	10,690	3,000	
Alphington Village Hall (Repairs & Extension)	50,000			50,000	
St Sidwells Community Centre	40,000	17,627	17,627	22,373	
Exeter Gymnastics Club	40,000	40,000	40,000		
City Centre Enhancements	8,260	177	8,260		
Paris Street Roundabout Landscaping & Sculptural Swift Tower	24,840	14,521	24,840		
Ibstock Environmental Improvements	3,240	1,845	3,240		
Local Energy Network	67,050	67,050	67,050		
Leisure Complex - Build Project	1,600,000	846,705	1,600,000		
ECONOMY TOTAL	**4,671,760**	**2,246,887**	**4,260,927**	**398,098**	**(12,735)**

AREAS OF BUDGETARY RISK

The table below identifies areas that have been identified as a budgetary risk within the Economy Services revenue and capital budgets.

The revenue budget areas of risk are:

Budget Title	Approved Budget	Risk
Revenue: Estates Services	(£2,438,380)	The income budget in respect of the council's property portfolio is in the region of £3.5m. A void allowance is included in the budget to cover any shortfall of income for the unoccupied properties. However if properties remain void for a long period, there is a risk that the income budget may not be achieved. In addition, if properties remain void for a long period the Non Domestic Rates liability falls on the council.
Revenue: Car Parking	(£5,625,710)	The fee income budget for car parking is £5.6m; figures to date indicate that this should be achieved. However, a 2% shortfall in income would mean a shortfall of £112k against the budget. This is an ongoing budgetary risk to the organisation, however fee income is projected to be above the profile for the year.
Revenue: Planning Services	763,390	There has been a number of planning decisions which have been appealed. This has resulted in a need for external consultancy advice. To date £154k has been spent with an additional £75k anticipated for ongoing appeals. There is a risk that further expenditure, over and above the £75k, will be required.

Budget Title	Approved Budget	Risk
Revenue: Markets & Halls	(£372,210)	In recent years, the Markets and Halls service has achieved higher net income than estimated. The income estimates for 2015/16 were increased from £1.45m to £1.58m, and the outturn for 2014/15 exceeded those estimates. However, some sources of income cannot be guaranteed to continue at current or historical levels so there is a risk that the income budget may not be achieved.

REPORT TO SCRUTINY COMMITTEE - ECONOMY
Date of Meeting: 3 March 2016
Report of: Events, Facilities & Markets Manager

THE MATFORD CENTRE – PERFORMANCE REVIEW

Is this a Key Decision?

No

Is this an Executive or Council Function?

Executive

1. What is the report about?

To update Members on the performance of the Matford Centre.

2. Recommendations:

That Scrutiny Committee – Economy notes and comments on the content of the report.

3. What are the resource implications including non financial resources.

There are no resource implications.

4. Section 151 Officer Comments

There are no financial implications.

5. What are the legal aspects?

None.

6. Monitoring Officer's comments

The report raises no issues for the Monitoring Officer.

7. Background

7.1 The Matford Centre is part of the Facilities & Markets section of Economy. The section also encompasses Exeter Corn Exchange, Tourist Information Centre, Underground Passages, Quay House Visitor Centre, Red Coat Guides, Leisure Facilities Contract Management and Markets.

7.2 The Matford Centre is comprised of Exeter Livestock Centre, Hussey's vehicle and plant auctioneers, a number of business units, an events concourse, cafe, meeting rooms and extensive outside areas.

7.3 The Matford Centre has a staffing establishment of 3.55 FTE. These employees cover administration, tenant liaison, site security and maintenance, facility management, event management and cleaning. Casual employees are also used to assist with the Sunday Market and occasional general duties. The Matford Centre team also looks after other City Council markets and liaises with and assists external market organisers.

8 Exeter Livestock Market

8.1 The livestock market operation is the largest in Devon with only one market in the South West enjoying higher business levels. It is seen by the farming community as the main livestock market in the county and supports the farming hinterland of the city.

8.2 The livestock auctioneers, Kivells & Husseys of Exeter, have now completed almost four years of operating from the centre having taken over the running of the livestock markets in April 2012. They have been successful in attracting new business to Exeter and animal throughput has increased when compared to the previous auctioneers. The first three years of operation under the new auctioneers saw a 40% increase in throughput compared to the last three years under the previous auctioneers.

8.3 Approximately 80% of the throughput is sheep/lambs with the remaining 20% predominately cattle but also including pigs and horses (sold at the monthly horse and tack sale).

8.4 The increased throughput, combined with an increase in the prices achieved at market, resulted in the City Council receiving almost £800,000 over the first three years of the lease. This compares with a minimum guaranteed rent of £215,000 a year.

8.5 The total value of the transactions carried out at the livestock market is more than £30 million a year.

9 Events at the Matford Centre

9.1 The Centre's indoor concourse is used as a venue for a range of events. Events are mostly limited to Saturdays because of the business units situated around the concourse but there are also a small number of midweek events which can be accommodated. The number of days booked for events in 2015 was 63. This number doesn't change much from year to year because of the limited number of days available:

Year	2011	2012	2013	2014	2015
Event days	64	62	68	63	63

9.2 The events hosted in 2015 were:

12 Trade/Business Shows, 12 Dog Shows, 8 Flea Markets, 8 Antique Fairs, 8 Educational, 3 Railway Shows, 3 Toy Fairs, 3 Training Events, 2 Cat Shows,1 War Games Event, 1 Stunt Show, 1 Dance and 1 Carol Service.

9.3 Income earned from these events over the last five years averages at around £64,000 a year with a similar amount projected for the current financial year.

9.4 The centre has a number of meeting rooms which are available for hire. In 2015 the number of meeting room bookings was 414. The number of bookings over the last five years was as follows:

Year	2011	2012	2013	2014	2015
Bookings	361	409	411	471	414

9.5 Income earned from these bookings over the last five years averages at around £44,000 a year. Income for the current financial year is projected to be £42,000.

10 Sunday Market

10.1 The centre hosts a market and car boot sale every Sunday morning. This sees a mix of market traders' stalls and private individuals selling their possessions at the car boot sale.

10.2 The market is managed by one of the full time Matford Centre employee assisted by two casual employees and representatives from charities/community groups who earn funds for their organisations by assisting with various duties at the market.

10.3 Income earned at the market in the 2014/15 financial year was £135,000. Income earned from the Sunday Market/Car Boot Sale over the last five financial years was as follows:

Year	2010/11	2011/12	2012/13	2013/14	2014/15
Income	£137,000	£142,000	£132,000	£139,000	£135,000

10.4 The latest projection for income in the current financial year is £101,000. This is because the market was closed for November and December because of major construction works taking place on the site. The market re-opened at the start of January but with a much smaller area available for market traders and car booters.

10.6 The projection for the next financial year (with a full year operating the market on the smaller site) is for income in the region of £55,000. The reduction in income will be mostly offset by rent received from the bus depot operator.

10.7 Local community groups or charities assist with the organisation of each market by providing volunteers who collect car boot fees, assist with parking and cleaning the site. In the 2014/15 financial year payments to these groups amounted to £25,000. Payments over the last five years were as follows:

Year	2009/10	2010/11	2011/12	2012/13	2013/14
Payment	£28,000	£26,000	£24,000	£24,000	£24,000

10.8 The latest projection for payment to the charities/community groups in the current financial year is £18,000. This reduction is because of the temporary closure of the market and revised requirements now that the market has returned with a smaller footprint.

10.9 The payments to these groups in the next financial year (with a full year of the revised requirements) will be £15,000.

11 Leased properties

11.1 The centre also earns income from a number of leases. These are a restaurant, vehicle and plant auctioneer, livestock auctioneer's office, two property offices, a driving and safety training company, two agricultural suppliers, a solicitors' office, an insurance office and an accountant.

11.2 These have been at full occupancy for some years (other than for short transition periods between changes of tenants).

11.3 The total amount of income earned from these leases is approximately £172,000 a year.

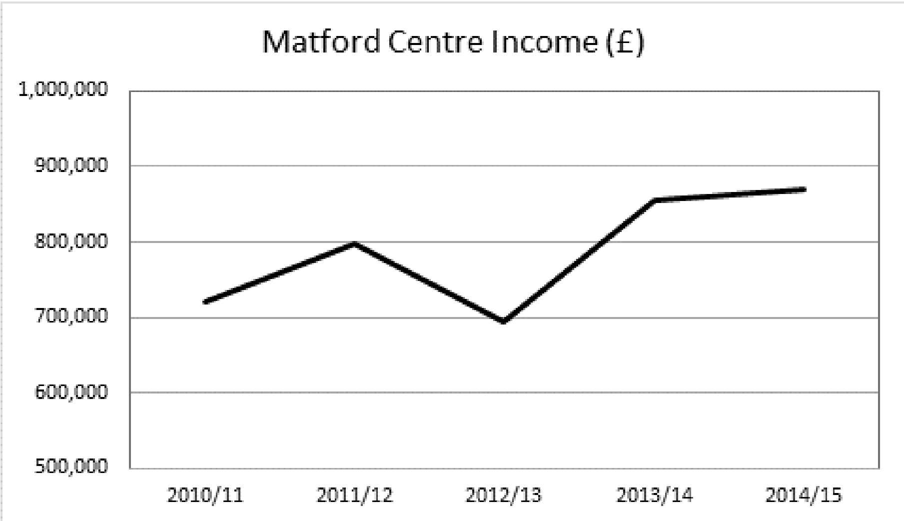
12 External Areas

12.1 The centre has a large external area which, in addition to serving the Livestock Market, Sunday Market and concourse events also produces an income from activities such as vehicle storage and lorry and motor cycle training. The income earned from this source is currently around £70,000 per year.

13 Financial Performance

13.1 Total Income earned at the facility has increased over the last five financial years, from £721,000 in 2010/11 to £871,000 in 2014/15. Income received over the last five financial years was as follows:

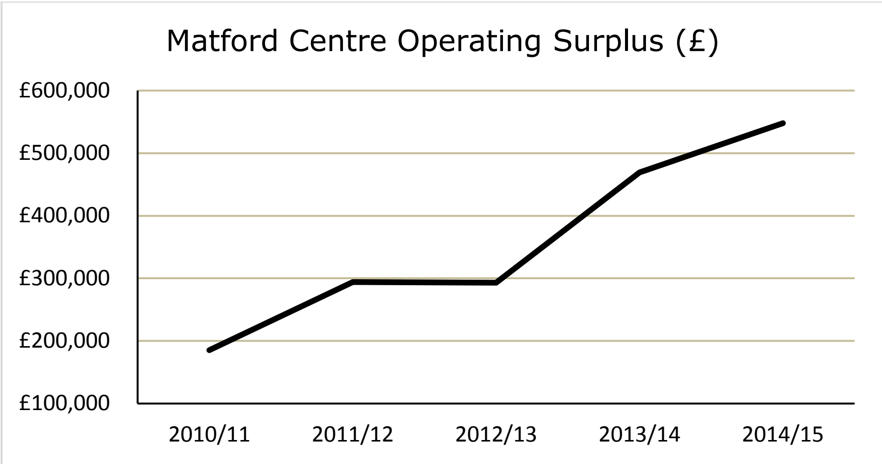
Year	2010/11	2011/12	2012/13	2013/14	2014/15
Income	£721,000	£797,000	£695,000	£856,000	£871,000



13.2 The latest projection for total income in the current financial year is around £800,000.

13.3 The nett surplus has increased over the last five financial years, from £185,000 in 2010/11 to £548,000 in 2014/15. The surplus achieved over the last five financial years was as follows:

Year	2010/11	2011/12	2012/13	2013/14	2014/15
Surplus	£185,000	£294,000	£293,000	£469,000	£548,000



Note:
Figures exclude capital charges

13.4 The latest projection for the nett surplus in the current financial year is around £475,000.

14 Other issues

14.1 The centre's roof was replaced during the last three months of 2015 and this secures the life of the centre for another 20 years.

14.2 The replacement of the roof allowed the installation of more than 5,000 PV panels which will mean that the centre will be mostly self-sufficient in terms of electricity usage. Electricity will also be sold to the centre's tenants and the extra electricity generated will be sold back to the national grid. The PV panels are expected to earn the council around £145,000 a year.

14.3 The development on the site of a replacement for the Stagecoach bus depot/garage is progressing well. The expectation is that the new bus depot will start operating in October 2016.

David Lewis, Events, Facilities & Markets Manager

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

Contact for enquires: Sharon Sissons
Democratic Services (Committees), Room 2.3, 01392 265275

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REPORT TO SCRUTINY COMMITTEE - ECONOMY
Date of Meeting: 3 March 2016
Report of: Events, Facilities & Markets Manager

EXETER CORN EXCHANGE – PERFORMANCE REVIEW

Is this a Key Decision?

No

Is this an Executive or Council Function?

Executive

1. What is the report about?

To update Members on the performance of the Corn Exchange.

2. Recommendations:

That Scrutiny Committee – Economy notes and comments on the content of the report.

3. What are the resource implications including non-financial resources.

There are no resource implications.

4. Section 151 Officer Comments

There are no financial implications contained within the report.

5. What are the legal aspects?

None.

6. Monitoring Officer's comments

The report raises no issues for the Monitoring Officer.

7. Background

7.1 The Corn Exchange is part of the Facilities & Markets section of Economy. The section also encompasses the Matford Centre, Tourist Information Centre, Underground Passages, Quay House Visitor Centre, Red Coat Guides, Leisure Facilities Contract Management and Markets.

7.2 The venue is a directly managed facility which hosts a programme of arts and entertainment events as well a number of community and business related events.

7.3 The Corn Exchange has a staffing establishment of 4.1 FTE plus currently one apprentice. These employees cover programming, administration, marketing, box office, facility management, event management, bar, catering, maintenance and cleaning. Casual employees are also used to provide the bar & catering service and front of house and contractors are used for tech requirements and some maintenance/cleaning.

8 Arts & Entertainment Programme

8.1 The Corn Exchange stages a year round programme of arts and entertainment events. This programme is increasingly a major part of the cultural offer within the city. Events in this category are those for which the venue box office sells tickets and the venue markets the events through its events' guide and website.

These events are organised in various ways. Some are directly promoted by the venue team (the artist is paid a guaranteed or variable fee and income is retained by the venue), some are jointly promoted with the artist or a third party (typically box office income would be split between the venue and the joint promoter) and a few are venue hires (the artist or promoter pays an agreed fee for the venue and all box office income is paid over after the event).

8.2 The number of such events staged at the venue has increased notably over the last five years:

Year	2011	2012	2013	2014	2015
Events	78	91	99	101	137

8.3 The financial value of promoting these events is measured by comparing the Nett income to the venue from ticket sales, hire fees and ancillary income (including bar/catering receipts) with all variable costs incurred by staging the event. These costs include artists' fees, technical costs, casual staffing, bar/catering cost of goods sold and PRS fees.

8.4 The financial performance of the arts/entertainment programme has also improved notably over the last five years:

Year	2011	2012	2013	2014	2015
Profit (£)	82,000	97,500	101,500	114,000	155,000

8.5 Amongst the best supported shows at the venue in 2015 were comedy performances by Alan Carr, Al Murray, Tim Vine, Milton Jones, Sean Lock, Henning Wehn, Josh Widdicombe, Andy Parsons, Ed Byrne, Rich Hall and Stewart Francis, all of which sold out. As did the performance by Jimmy Carr which the Corn Exchange team promoted at the Riverside Leisure Centre.

8.6 Other sold out events at the venue were Steve Backshall, The Unthanks, Monty Don, Gordon Buchanan, Banff Mountain Film Festival, Robin Trower, Livewire & Limehouse Lizzy, International Ocean Film Festival and Ukulele Orchestra of Great Britain

9 Other Events at the Venue

9.1 In addition to the 137 events which formed the arts & entertainment programme in 2015, the Corn Exchange also hosted another 245 events (events for which the venue does not provide a box office facility, these are all venue hires). These events were:

Participation Dance	130
Examinations	23
City Council bookings	16
Stage Shows	16
Conferences/Training	14
Tech/Rehearsal Days	13
Blood Donor sessions	9
Presentation events	4
Sports/games	6
Fairs	6
Other events	8

9.2 The average hire fee received from these bookings after discounts allowed for non commercial/charity events was £495. This compares to £445 achieved in 2014.

9.3 The total number of events staged at the venue (arts and entertainment programme and venue hires combined) in 2015 was 382. The number of events staged at the venue over the last five years has shown little variation.

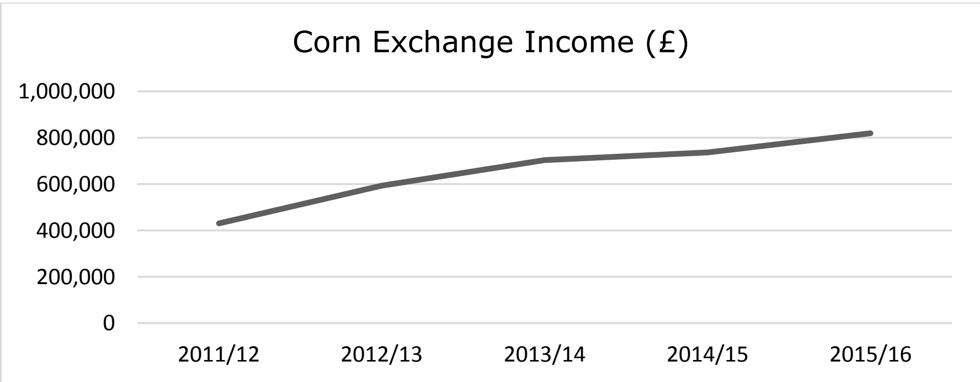
Year	2011	2012	2013	2014	2015
Events	382	377	385	378	382

9.4 The reason for the total number of events showing little variation year on year is the limited availability of the venue for evening events outside the summer months. There is potential to increase daytime bookings and the Corn Exchange team are exploring ways to address this.

10 Financial Performance

10.1 Income earned at the venue has increased over the last five financial years, from £430,000 in 2011/12 to an estimated £820,000 in the current financial year.

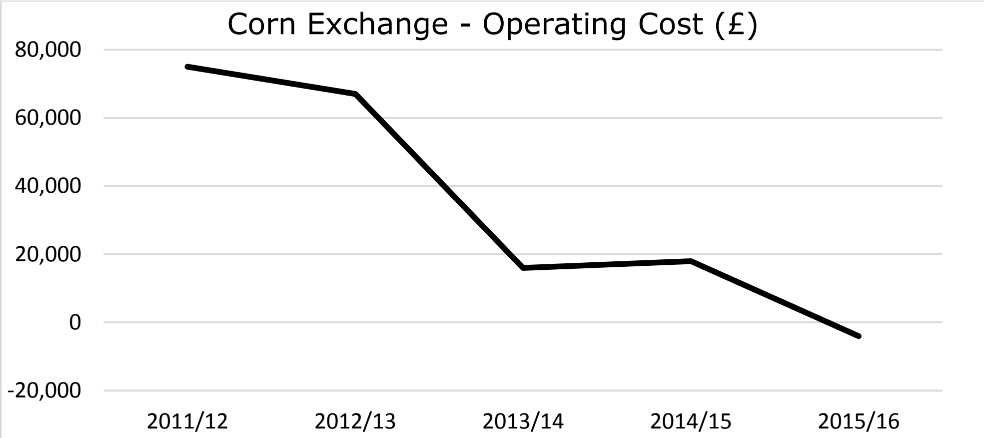
Year	2011/12	2012/13	2013/14	2014/15	2015/16
Income (£)	430,000	594,000	703,000	737,000	820,000



Note:
The income for the 2015/16 financial year is the current projection and subject to change.

10.2 The overall cost to the Council of providing the venue has decreased over the last five financial years, from £75,000 in 2011/12 to an estimated surplus of £4,000 in the current financial year.

Year	2011/12	2012/13	2013/14	2014/15	2015/16
Venue cost (£)	75,000	67,000	16,000	18,000	+4,000



Notes:
The income for the 2015/16 financial year is the current projection and subject to change.
Figures exclude capital charges

10.3 These figures include approximately £35,000 a year paid to other council departments (support services).

10.4 It is important to note that the Corn Exchange differs from many other entertainment/arts venues, both within the city and nationally, in that it receives no external funding.

10.5 The Corn Exchange building also incorporates a number of retail units and an indoor car park, these are leased by the Council to private tenants and the income from these leases is accounted for separately by the Property Services section of the Council. The income from these properties is approximately £300,000 per year.

11 Box Office

11.1 In June 2015 the Corn Exchange introduced a new box office system – Spektrix. This replaced the previous system which had been perfect whilst we were developing our events programme but it wasn't able to cope with the increased business.

11.2 The new box office system has allowed us to improve our marketing and analyse ticket sales much better as well as making it much easier for people to book on line which was very difficult with the previous system.

11.3 The cost of the box office system has been covered by booking fees charged to customers. This has brought the Corn Exchange into line with most other venues and hasn't been a barrier to ticket sales. The booking fee levied for online bookings is lower than it was with the previous system.

12 Marketing

12.1 The venue has a marketing/printing budget of £15,000 a year. This is mostly utilised in the printing and distribution of a twice yearly events guide. Some of the budget is also used for posters, email marketing, social media ads and occasional press advertisements.

12.2 Analysis of ticket sales through the box office system (since the system was introduced in June 2015 until the end of the year) shows that the source of information for events selected by ticket buyers those who specified such was as follows:

Corn Exchange events guide (brochure)	27%
Corn Exchange website	22%
Other websites	12%

Corn Exchange email marketing	11%
Social media	9%
Posters	7%
Publications (mainly Exp & Echo & Citizen)	7%
Other sources	5%

12.3 The number of people visiting the venue's website has increased substantially since the sub-site for the venue was created (separating it from the main Council website). In the first full year that the site was operational (2012) there were 56,000 visits to the site and 246,000 page views. In 2015 these figures had increased to 135,000 and 821,000 respectively.

Year	2012	2013	2014	2015
Visits to website	56,000	81,000	99,000	135,000
Individual page views	246,000	427,000	539,000	821,000

12.4 The venue's website is now outdated and lacks functionality. The Corn Exchange team are working with Strata Services to replace this with a new fit-for-purpose website in the near future.

12.5 The marketing plan for the venue is currently very much centred on the events guide, website, email marketing, media releases and social media. Paid for media advertising is only used on rare occasions and the venue's marketing plan is to continue with the present policy which has resulted in increased business without increasing the marketing spend.

13 Bar & Catering

13.1 Bar and catering income earned at the venue has increased over the last five financial years, from £171,000 in 2011/12 to an estimated £213,000 in the current financial year.

Year	2011/12	2012/13	2013/14	2014/15	2015/16
Income (£)	171,000	174,000	196,000	182,000	213,000
COGS (£)	39,000	45,000	59,000	57,000	66,000
Gross Profit	77%	74%	70%	69%	69%

Notes:
The income for the 2015/16 financial year is the current projection and subject to change
COGS = Cost of Goods Sold: the purchase cost of the drinks/food
The gross profit is the difference between the income and the COGS expressed as a % of the income

13.2 Approximately 80% of the bar and catering income comes from drink sales with 20% from food. The potential to increase the food sales for events is limited because of the type of events staged and the location of the venue in the city centre with its level of competition. However, one or two initiatives aimed at increasing food sales are beginning to achieve results and food income for 2015/16 is projected to be £66,000 which would be the highest figure recorded at the venue and 24% of the total bar and catering income.

14 Other Issues

14.1 The main issues affecting the venue are:

14.2 The capacity is restricted to just 500 people because of fire exits. This limits the events that can be attracted to the venue. There is no identified way to solve this without major capital works.

14.3 There has been a notable increase in anti-social behaviour in the vicinity. The venue team, together with other interested parties, continue to work with the police and other sections of the council in an attempt to address this issue.

14.4 All tenancies within the Corn Exchange building expire in 2020. Because the venue is programmed up to two years in advance there will shortly need to be a decision taken regarding the future of the venue from this date. The Corporate Manager Property is leading on this issue and an asset review will be undertaken shortly.

David Lewis, Events, Facilities & Markets Manager

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

Contact for enquires: Sharon Sissons
Democratic Services (Committees), Room 2.3, 01392 265275

LEGACY LEISURE WORKING GROUP

Tuesday 9 February 2016

Present:-

Councillor Heather Morris (Chair)
Councillors Denham, Henson and Robson

Also Present

Leisure Facilities Manager and Democratic Services Officer (Committees) (SLS)

1 APOLOGIES

Apologies were received from the Events, Facilities and Markets Manager.

2 MINUTES OF MEETING HELD ON 13 OCTOBER 2015 AND MATTERS ARISING

The minutes of the meeting held on 13 October 2015 were agreed as an accurate record of the meeting.

Councillor Morris referred to Minute 22, and confirmed that a letter had been sent to Devon County Councillor and Cabinet Member for the Youth Service, Councillor Barry Parsons, in which a number of anti-social behaviour issues relating to the Wonford Sports Centre were raised. She also referred to Minute 24 and suggested that the venue for future meetings after May could be revisited by the next appointed Chair.

It was agreed that an informal arrangement of inviting ward councillors to the Working Group meetings, when the leisure facility in their ward was being discussed, should be formalised. This would necessitate the changing of the terms of reference. A request to formalise the arrangements would be made the next meeting of Scrutiny Committee - Economy.

Councillor Henson wished to pass on his thanks to Councillor Morris for the professional way in which she had conducted the business of the Legacy Leisure Working Group.

3 UPDATE ON SITE VISIT 2 DECEMBER 2015

Members welcomed the opportunity to visit all of the facilities across the city. Councillor Brimble also commented on a number of issues at the Northbrook Swimming Pool, but would raise that later in the meeting.

It was noted that a further date for an annual tour of facilities had been made for 7 December 2016.

Customer Analysis

4 CUSTOMER COMMENTS ANALYSIS 2014/15

Steve Lyon circulated an analysis of customer comments made for each of the centres for the period December 2014 to December 2015, which monitored the trend in the quantity and type of comment received. The number of comments received was reported as a comparison with December 2014, and the number had reduced from 34 to 20, even though December was traditionally a quieter month. The analysis was part of the contract monitoring process.

5 **CUSTOMER COMMENTS FEEDBACK DECEMBER 2015**

Steve Lyon circulated a copy of the detailed customer comments for the month of December 2015. The format included the response or action taken, under categorised headings of maintenance, health and safety, cleaning and by staff and where a compliment had been recorded on a centre by centre basis. An update on any responses was also made. Jeremy Wright stated that a number of responses generated by their proposal to change the opening times of the Pyramids Swimming Pool had resulted in the current opening time remaining at 6.30am, with an operational matter being resolved in a different way. He also confirmed that the Isca Centre, used a nationally nominated supplier from Parkwood. They had received many positive comments and the number of bookings had dramatically increased, providing excellent value for money in a good location, with parking.

Councillor Denham referred some previous comments about the state of cleanliness of the changing rooms at the Northbrook Swimming Pool. Steve Lyon confirmed that this had now been addressed along with a plumbing issue associated with the men's toilets had now been resolved. He also referred to some urgent action taken by Legacy Leisure, following a remedy notice to replace the changing room lockers. Jeremy Wright reported that although the lock mechanism on the existing changing room lockers could have been replaced, the time delay would have been unacceptable, so the more immediate action of replacement was taken. Councillor Brimble also referred to a number of comments he had received directly on a number of aspects at Northbrook Pool, with the showers and changing rooms highlighted as particular areas of concern. Jeremy Wright was working closely with the Manager to ensure that customer expectations were met. Councillor Morris suggested looking again at the customer comments card to ensure that it still was fit for purpose.

6 **PRESENTATION ON THE SERVICE IMPROVEMENT PLAN FOR RIVERSIDE LEISURE CENTRE**

Simeon Lewry, the Riverside Leisure Centre Manager attended and provided an update. He provided details of the gym refurbishment which had taken place in November and December, including the installation of cardio vascular fitness machines, which were networked, as well as two e-spinning bikes enabling patrons to use social media. Feedback from customers had been very positive. He responded to a Member's comment and stated that the runners were positioned so that screens could be viewed by other patrons and staff. There had been no incidents of misuse and staff remained vigilant, and a filter option was available if required.

There had also been building and maintenance improvements with new flooring in the reception, first floor and sports hall balcony, where it was hoped to make better use of the space. Sand filters in the pools and spa pool had been replaced with glass filters, which had resulted in an improved water quality. Simeon also referred to new equipment which had been purchased for new Jump and Jiggle sessions, which offered an activity for young children under the direct supervision of their parents and staff. Although this new session had not been actively promoted, it was already attracting 30/40 children a week. A new, larger sports hall inflatable had also been purchased.

Simeon outlined other plans for 2016 –

- the second phase of the gym refurbishment, with new resistance equipment
- replacement of the net dividing curtain in the main sports hall
- replacement flooring for the MP2
- continuation of the redecoration programme – with encouraging feedback from customers

A Quest assessment was held in December 2015, and the breakdown of modules confirmed the achievement had risen from satisfactory to good. There were a number of actions to complete in relation to the business plan.

Jeremy Wright referred to the efforts being made to rebrand Café Vita, part of the Parkwood Leisure brand. The café had been redecorated and included a new menu. Simeon responded to a Member's enquiry and confirmed there were no plans to resite the café within the Leisure facility at this stage of the contract.

Councillor Morris also raised an issue relating to the availability of a number of lockers in the gym. It was noted that the policy that lockers should be cleared at the end of the session or the day. Simeon would check the position. She also offered Simeon, the contact details for St Thomas Community Association and also St Thomas Trading Association to explore the possibilities of marketing the facility in the wider community. Councillor Denham agreed to send the details of wellbeing and safe guarding training offered by the Citizens Advice Bureau to enable staff to identify or signpost patrons that they came into contact with to other services including the Council. Councillor Morris also agreed to send on contact details and training available from the Exeter Dementia Action Alliance.

Simeon provided an update on anti-social issues relating to the area in and around the rear car park. Steve Lyon confirmed that the local PCSO officer, Environmental Health officers and the Retail Park Management Company had discussed some concerns. Heras fencing had now been erected to cordon off the arches which had alleviated some of the issues. Although additional security measures had been put in place, other possibilities such as installing a gate on the entrance to the rear of their car park were being explored. Councillor Denham referred to the need to take a strategic approach to alleviate some of the issues effecting the area.

Members thanked Simeon for an informative and comprehensive report.

7 **DATE OF NEXT AND FUTURE MEETINGS**

Members noted the following dates -_

19 April 2016 -	Isca Bowls and Bridge Centre (Rennes Committee Room)
14 June 2016 -	Exeter Arena (Rennes Committee Room)
6 September 2016 -	Wonford Sports Centre/ Northbrook Golf Course (Terracina Meeting Room)
18 October 2016 -	Clifton Hill Sports Centre/Pyramids Swimming Pool (Terracina Meeting Room)
7 December 2016	Annual Tour of Leisure Facilities
13 December 2016 -	Northbrook Swimming Pool (Rennes Committee Room)

(The meeting commenced at 10.00 am and closed at 11.05 am)

Chair

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Legacy Leisure Working Group

Terms of Reference

Name of the Group: Working Group	Legacy Leisure (formerly the Parkwood Leisure)
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:	Quarterly / as required
Reporting Mechanism:	To report to the Scrutiny Committee
Function of the Group:	To work with Legacy 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 April 2015

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EXETER HIGHWAYS AND TRAFFIC ORDERS COMMITTEE

11 January 2016

Present

Devon County Council

Councillors Owen (Chairman), Foggin, Hannan, Hannaford, Hill, Leadbetter, Morse, Prowse and Westlake

Exeter City Council

Councillor Wardle

Apologies

Councillors Bull, Buswell and Newby (Exeter City Council)

*135 Minutes

RESOLVED that the minutes of the meeting held on 9 November 2015 be signed as a correct record

*136 Matter of Urgency: Playmoor Drive, Exeter

(An item taken under Section 100B (4) of the Local Government Act, 1972)

The Chairman had decided that the Committee should be advised of the receipt of a petition from the residents of Playmoor Drive containing 16 signatories relating to the condition of the Road and safety matters.

The Neighbourhood Highway Group Manager reminded members that this matter had been considered at the last meeting (Minute *131) when it had been reported that a highways inspection had been undertaken and no safety defects detected. In accordance with the Council's petition scheme he would respond to the petitioners on the issue within 15 days.

*137 Bus Services in Exeter

Mr Williams, Commercial Director Stagecoach attended and spoke at the invitation of the Committee on developments affecting bus services and the network in Exeter and environs since the last meeting on:

- upgrading of the 57 Service and reduced fares as part of the 'January Sales'
- a new fleet of double deckers for the red Park & Ride (P&R) Service upgraded with Wi Fi etc. and improved specifications for the blue/green services
- the introduction shortly of a 'smart' card to be given to all passengers to facilitate easy on-line payment and speed-up boarding times
- a proposed new South West Regional Coach service to serve Bristol Airport from Plymouth, Exeter and Taunton providing a third transport link for the region.

Additionally issues and/or observations identified during the course of discussions, included:

- future proposed arrangements for boarding Coaches in Bampfylde Street as a result of new proposed City Centre Bus Depot (which was still subject to planning permission) noting the loss of the waiting room for coach passengers but with no overall reduction in coach bay capacity; the new proposed arrangements provided for improved flexibility for its bus services, more room for the coach passengers to load/unload luggage and Stagecoach was working within the constraints of the proposed arrangements and limitations of the site;

- the proposed highways routes in and out of the proposed City Depot were viewed by Stagecoach as an improvement on current arrangements and with the pedestrianisation scheme for part of Paris Street an improvement also for the City Centre;
- the current in/out bound routes for P&R from the new depot in Matford would not change as a result of the new proposed arrangements and no bus routes would be diverted through Alphington; only buses serving Alphington would use that route and drivers would be instructed accordingly;
- the removal of the bus stop with passenger seating in South Street (following a recent accident); the Neighbourhood Highway Group Manager undertook to ascertain for Members whether seating would be replaced as this was contracted by the County Council;
- notification to the local member of when the bus stop outside of Newport Station would be reinstated;
- alleged continued bus 'bunching' on the A service which Mr Williams undertook to review
- problems for all City Centre services caused by congestion around the Christmas period, which was particularly difficult during this festive season; and Mr Williams referred to the need for effective enforcement of parking restrictions in the City during the period to help alleviate congestion particularly in Paris Street, Bampfylde Street and Western Way areas;
- Stagecoach was aware of the growing market relating to Exeter Airport and the current bus service to the airport was subject to review under the County Council contract.

The Chairman indicated that she would forward to Mr Williams further questions relating to the new proposed arrangements at the City Centre Bus depot and thanked him for the updates and responses to Members' questions.

*138 Petitions/Parking Policy Reviews

There was no petition for a parking review from a Member of the public or Council.

*139 Hollow Lane – Traffic Management Scheme

The Committee considered the report of the Head of Planning, Transportation and Planning (PTE/16/5) on a proposed traffic management scheme to provide an enhanced walking and cycling route at Hollow Lane, Exeter and improved access to the Ellen Tinkham School with associated Traffic Regulation Orders that had been advertised to close the route to through traffic and to manage parking within the Lane. The Head of Service reported that Ellen Tinkham School was supportive of the proposals including the access arrangements.

It was **MOVED** by Councillor Morse, **SECONDED** by Councillor Foggin and

RESOLVED

(a) that the scheme shown on plan C12018/10A included in Appendix I to report PTE/16/5 be approved at an estimated cost of 108,000;

(b) that approval be given to make, seal and implement the Traffic Regulation Orders as detailed in Section 2 of report PTE/16/5 having regard to all relevant factors under Section 122 of the Road Traffic Regulation Act 1984.

*140 Zebra Crossing – Okehampton Road

The Committee considered the report of the Head of Highways, Capital Development and Waste (HCW/16/3) on investigations into the need for a zebra crossing on Okehampton Road near the junction with Buller Road following a petition from local residents and local City and County Council members that had been received at the Committee meeting on 28 July 2015 (Minute *115). Following traffic surveys, an assessment of potential loss of local parking, the data for pedestrian and vehicle demand did not support the introduction of a zebra crossing. The Head of Service also reported on the receipt of a petition in opposition to the requested crossing. The local County Councillor referred to the possibility of a further review at a later stage and potential developer contributions in view of new proposed residential development in the area.

It was **MOVED** by Councillor Owen, **SECONDED** by Councillor Morse and

RESOLVED that the introduction of a zebra crossing on Okehampton Road between the junction of Buller Road and Western Road is not justified by the results of the pedestrian and traffic survey and casualty record and no further action be taken on the request.

*141 Road Closures in the City

The Committee noted the report of the Head of Highways, Capital Development and Waste (HCW/16/4) on roadworks undertaken in November 2015 following concerns by members on the number affecting main arterial routes in the City. The project management process as laid out in the Network Management Plan (previously considered by this Committee) included the requirement to inform local members of impending works and ways to improve communication would be discussed with members.

*142 Park & Ride and Park & Change Update

The Committee received a presentation by the Head of Planning, Transportation and Planning covering:

- the current Park & Ride sites to the west at Matford and to the east at Sowton and Honiton Road and costs of providing new traditional Park & Ride sites with high capital and ongoing revenue costs
- proposal for a new 600 space Park & Ride scheme at the Roundfield Site, to the south of the A30 corridor which was now being taken forward to alleviate congestion on the A377 Alphington corridor
- the concept of Park and Change
- The failure to identify a site to the north of the city and the A377 Cowley Bridge Road corridor; and where possible, existing bus and rail services would be used to serve this corridor, to be achieved in part through new Park and Change opportunities;
- a study to identify park and change options for Exeter, Newton Abbot and Totnes.

The Head undertook to circulate further details of the proposals to Members.

*143 Proposed Restrictions: Cowley Bridge Road, Exeter (Minute *130)

The Chairman and the Head of Planning, Transportation and Environment reported on a site visit undertaken by local members as part of the consideration of objections to the Traffic Regulation Order (TRO) for the relocation of residents parking bays on Cowley Bridge Road (A377) to facilitate a ghost island right turn on the A377 into the reconfigured layby to be funded by developer contributions in the future expectation of the new Steiner school reaching its capacity of 620 pupils.

It was **MOVED** by Councillor Prowse, **SECONDED** by Councillor Owen and

RESOLVED that the existing residents parking bays be retained and that the right turn facility be not provided.

*144 'A' Boards and Enforcement

In accordance with Standing Order 23(2) Councillor Prowse had requested that the Committee consider his and local concerns about the proliferation of A Boards and other obstructions from local businesses in the Queen Street/Gandy Street areas; and other Councillors gave examples of obstructions in the Cowick Street and South Street areas.

The Neighbourhood Highway Group Manager reported on the County Council's policy (a copy of which would be circulated to Committee members).

The Group Manager also reported that following requests to local businesses, any necessary enforcement action to remove obstructions that did not comply with the policy would be taken (in conjunction with police officers) when necessary.

Members were invited to liaise with their local Neighbourhood Highways Officers to identify any areas of concern who would then consider appropriate actions to be taken in accordance with Council policy.

***145 Parking Issues, Pennsylvania Road, between Junctions Argyll Road and Rosebarn Lane (combined with APM policy and Access Protection Markings Re-instatement)**

In accordance with Standing Order 23(2) Councillor Prowse had requested that the Committee consider the current parking arrangements in Pennsylvania Road near Rosebarn Lane and Argyle Road and concerns about the impact of unrestricted parking by non-residents. Councillor Prowse confirmed that he had reviewed the impact of the parking restrictions introduced in Rosebarn Lane with officers, and no further action was necessary in that respect. The Committee noted that the local County Councillor would visit these roads accompanied by the local Neighbourhood Highway Officer to assess whether Access Protection Markings (AMPs) would assist local residents and whether they would be in accordance with policy.

***146 Dates for Future HATOC Meetings**

Dates of future meetings of County Council meetings may be seen at:

https://new.devon.gov.uk/democracy/calendar/

DENOTES DELEGATED MATTER WITH POWER TO ACT

The meeting started at 2.15 pm and finished at 4. 25 pm

The Minutes of this Committee are published on the County Council's Website at:-
http://www.devon.gov.uk/dcc/committee/mingifs.html