

Consultation Draft

Towards the development of a Place Marketing Strategy for Exeter

2012 – 2016

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1 Executive Summary

- 1.1 Exeter is the principal economy west of Bristol and has in the last decade outperformed most locations across the UK for job creation, featuring in the top 2% for employment growth.
- 1.2 The UK Competitiveness Index confirmed that Exeter has seen the greatest improvement in competitiveness against all other UK locations. The city's local economy continues to attract investment, create new businesses, support and grow existing businesses and draw in high calibre employees. With significant planned economic and retail developments and increased availability of employment land, Exeter is in a strong market position to grow its economy further.
- 1.3 It is proposed that this Place Marketing Strategy has four objectives designed to reinforce Exeter's strong market position, to:
 - secure commercial and public sector investment to reinforce Exeter's position as one of the main "power houses" of the South West economy
 - attract new employers and particularly more knowledge-based businesses and entrepreneurs into the city's economy
 - reinforce the city's reputation for having a leading combination of retail, heritage and cultural experiences
 - attract and retain skilled workers
- 1.4 Investors, businesses, and workers are drawn to Exeter by the strength of, and confidence in, the local economy and its ability to create employment. Supporting this offer is the city's renowned quality of life and its geography as a place which is accessible, is on a comfortable scale and easy to move around. Such attributes are attractive to knowledge-based businesses and workers, and visitors and students alike.
- 1.5 However, quality of life alone is not the driver of economic development, prosperity and a sense of place. A city's sense of place, which can add to the attraction of a city is engendered principally by – the nature and quality of the physical and natural environment, the layers of history that are its story, the diversity, and character of its population and, the presence of well-known people and renowned organisations, products or services.
- 1.6 Investors, businesses, and skilled workers predominantly see cities through their perceptions of a number of characteristics when assessing the merits of investing time or resource, or moving or remaining there. However, in an increasingly complex and competitive world, many people, and businesses are digitally or otherwise connected and simultaneously overloaded with information. They have little time to pay attention. It is difficult for a place to stand out without proactive effort.
- 1.7 To stand out, it is vital that Exeter differentiates itself. Exeter needs to identify characteristics closely associated with the city that differentiate it from competitors. Crucially, whatever is done, said, and promoted about the city and its hinterland must be credible and mark it out as **the** place for investors, businesses, visitors, and students.

- 1.8 In terms of the city's characteristics, Exeter has an array of visible brand and cultural assets that potentially mark out the City's distinctive offer. For example, the University of Exeter, in the top 1% of the world's universities, is one, if not the most important visible brand asset. However, some assets are currently largely 'hidden' beneath people's general perception. For example, Exeter's top performing track record in job creation is currently a hidden brand asset.
- 1.9 Exeter could promote itself based on its brand and cultural assets. There is a strong story to tell. However, in the clamour to be heard, many locations might be perceived as being indistinguishable from other cities. Most other cities emphasise their location for quality of life. There are countless locations promoting, similar things and images to Exeter. It may not be easy to stand out. The question therefore arises, does Exeter need to identify and resource and deliver an iconic symbol or project that grabs and holds national and international attention and places the City at the forefront of people's minds, particularly investors, businesses and entrepreneurs?
- 1.10 In addition, to make the most of the city's offer, effective brand development is required. Like any other branded product or service, Exeter needs to consider how its assets can be used to drive and relate to the drivers of decision making and choice that influence how people might perceive the city as a place that will meet their needs.
- 1.11 Of primary consideration for investors, businesses and skilled workers is their desire for certainty regarding the strength of the local economy, its credibility as a profitable location and its ability as a good place for attracting and retaining skilled workers and developing careers. Providing these three groups with such confidence to locate themselves or invest in the Exeter Economy is the driver that most influences their decision making. Exeter can provide that certainty and confidence.
- 1.12 Exeter provides investors and businesses with the confidence of a strong local economy. The city has established a clear direction regarding its aspirations of where it intends go: the multi-million pound public and private sector investment partnership which is working well together within the Exeter and East Devon Growth Point, a 20 year major economic development programme, is indicative of the city's strength and the confidence in the area. The University of Exeter is going from strength to strength and is the 25th fastest growing organisation in the UK and within the top 100 across Europe. Flybe is expanding. John Lewis is opening a new store in 2012. This will position Exeter as the second largest retail catchment centre in the South West. The Science Park and City of Science initiatives illustrate Exeter's aspirations to grow more knowledge-based businesses in the area. Furthermore, the recent Exeter Chamber of Commerce and Industry's science and technology initiative with 100 local companies aims to promote the strengths of these business sectors.
- 1.13 With regard to the needs of employees, it is clear that Exeter is successful at creating jobs, providing the workforce with the confidence that the city is a good place to find employment. Between 2000 and 2009, the latest available figures, Exeter created 19,000 jobs, comparing favourably with much larger cities and employment locations, such as Cardiff, Edinburgh, and Belfast. Moreover, the Exeter and East Devon Growth Point projects the creation of a further 26,000 jobs by 2026, adding weight to Exeter's claim as a hub for job creation.

- 1.14 And in terms of high value employment, Exeter has the second highest concentration of knowledge-based services (KBS) within the South West, slightly behind and second only to Bristol.
- 1.15 Adding to these assertions and statements is Exeter's demonstrable ability to successfully support the most complex of relocations. The biggest example of which in the past 10 years was the city-wide effort and energy towards securing the relocation of and welcoming the Met Office, which is testimony to the city's capacity and determination to go that extra mile. Complementing this is a welcoming and on-going friendly networking environment, an important secondary consideration for investors and businesses. Underpinning these strengths is Exeter's reputation for an outstanding quality of life.
- 1.16 It can therefore be argued that Exeter has a range of credible and tangible assets that underpin the city brand. The promotional approaches used previously, 'Regional Capital', 'It's a capital city', and 'City of Science' have contributed to the success so far. However, against an increased level of promotional activity from other locations, it is appropriate to review and consider what approach is now required for the city's economy. Such an approach would need to promote a strong unifying brand and focus for enhancing and reinforcing as a positive perception of the city with the resources available. Resources are stretched and with more cities actively competing for inward investment, business growth and job creation, a shared and committed focused approach as one city is proposed in order to achieve the necessary impact.
- 1.17 It is not just about sharing and using the same city-wide logo and strap line. Exeter needs as many key local players as possible embracing the same core values and working together in a common direction in developing and promoting the city. It is about agreeing and sharing common messages, maximising the opportunity for visibility and reinforcing the brand. It is also about harnessing the collective enthusiasm and resources applied by many local organisations and individuals in the pursuit of promoting some positive aspect of the city and its environs.
- 1.18 It is recommended that a Marketing Alliance is formed with key partners and influencers who possess the right skills or have a vested interest in formally committing to developing and implementing the marketing strategy. The purpose will be to act together to drive and deliver a range of actions which effectively raise the city's profile. Such action will contribute towards Exeter being recognised as one of the places to note in the UK for investors, businesses and skilled workers and the undisputed principal economy west of Bristol. The actions are:-
- to establish a Marketing Alliance to drive and co-ordinate a one city approach to promotion and marketing
 - to review the current city branding approach, to determine and agree the range of key messages to project and to agree an appropriate core brand and the most effective strap line(s) based on achieving a sound and credible portrayal of the city's relevant strengths.
 - to commit resources to produce and deliver a Communication Plan to be developed through shared activities including developing effective media relations, social networking and events, marketing and budgets
 - to establish with partners across the city economy, effective PR at local, regional, national and international levels

- to develop, produce and maintain a city wide promotion and marketing website and social media campaign.
- to establish specific sector marketing groups from across the city economy to determine the benefits, opportunity and approach to raising the profile of each sector
- to establish a task and finish group to target and attract major national and international events to raise Exeter's profile and boost the city economy
- to establish a task and finish group to identify and test the feasibility of delivering an iconic project beneficial to the city economy

2 Aim

2.1 The proposed aim of the strategy is:

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

3 Objectives

3.1 The principle objectives of the strategy are to:

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

4 Context in Brief

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

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

4.3 Exeter has a very good level of amenities which are attractive to residents, students,

visitors, and businesses alike. This offer is enhanced by the extensive range of historical, cultural, heritage and outstanding natural coastal and rural environments within the city's surrounding area that includes the council areas of East Devon, Teignbridge, and Mid Devon, known locally as Exeter and the Heart of Devon (EHOD).

- 4.4 The city has a reputation for an outstanding quality of life and is regularly voted first in national surveys. Features of Exeter's surrounding area add to this picture, which is made up of rural, market and coastal villages and towns, with easy access to a vast range of outdoor pursuits, the moors, and the sea. In addition, Exeter, within this setting, provides an eclectic mix of outdoor and indoor activities that holds many interests for people of different ages and lifestyles. Further information can be found within the appendices.
- 4.5 Exeter is a beacon of knowledge. The Times and the Times Higher Education World University Rankings position the University of Exeter, which has 18,000 students, 10th in the UK, 74th in Europe and 184th in the world (in the top 1%). The University's ambition is to reach the top 100 in the world by 2015. Nearly 90% of its research is at internationally-recognised levels in science, the arts and humanities. These disciplines also feature in the five interdisciplinary research themes of the University's Science Strategy.
- 4.6 Knowledge-based businesses within Devon are concentrated within the city. Exeter together with its wider economic footprint is the focus for knowledge-based services across¹ the whole of Devon, accounting for 55 per cent of employment in the city in this sector. The city alone accounts for over 31 per cent of such employment in Devon. The value of these services lies in their ability to transfer useful knowledge from one organisation to another.
- 4.7 John Lewis will open a major store in Exeter in 2012 and this will increase the city's retail footprint, increasing its national ranking as the second largest retail catchment in the South West. The appendices contain additional information on Exeter's national retail rankings. This and large strategic developments which are in the pipeline, for example: Exeter's bus station development, Hill Barton Business Park and most recently the programme of development covered by the Exeter and East Devon Growth Point, place Exeter in a strong market position as the regional hub for investment, businesses and skilled workers. Through some £1billion of private and public sector investment, the Growth Point is forecast to create some 26,000 new jobs and to be a beacon of excellence in taking forward integrated and sustainable housing and employment development. A more detailed summary of the city's characteristics and strengths are given in Appendix 1.

5 City Place Marketing

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

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

The significance of a ‘sense of place’

- 5.2 A city’s sense of place is engendered principally by – the nature and quality of the physical and natural environment, the layers of history that are its story, the diversity, and character of its population, the presence of well-known people and renowned organisations, products or services.
- 5.3 Each city has a range of characteristics and assets that define how it is perceived and how it compares with other places by those that live, work, study and visit there. How well a city ‘scores’ in the minds of its various audiences will affect its ability to draw in investment, new businesses, skilled workers , visitors and students.
- 5.4 Importantly, to be in the rankings, the city needs to be seen and establish its reputation as having an environment that stimulates opportunities; a diverse and dynamic business structure, a knowledge base that is still growing and underpins commercial growth, and a policy environment which provides leadership, guidance, and particularly supports and welcomes investment.
- 5.5 When residents, students, media, investors, businesses, and visitors think of Exeter, what principally may come to mind? How far does Exeter’s reputation extend? Exeter may be many things to many people, some may see it as a historic city, or a city that is a relaxed place for visitors, whilst some may see Exeter as it can be, as a dynamic, vibrant, and forward-thinking city.
- 5.6 Increasingly cities and their surroundings are competing for investment, business, visitors, and students on the appreciation of their quality of life assets. Therefore, Exeter must continue to pay attention to and improve those aspects of its space (its location), place (its distinctiveness), and environment (its natural assets) that are the foundations of its character.
- 5.7 The recently published consultative paper for Exeter, ‘A City Centre Vision for a Green Capital’ (June 2011) is the start of defining a long-term strategic and physical vision for the centre of the city. Importantly, the paper sets out a framework for taking forward the Exeter Vision, which has defined overarching themes and aspirations for the city. Visions generally precede development. The ingredients within the green capital vision may take some 10 – 20 years or more to achieve. And yet, by providing a clear physical definition for the use of Exeter’s space and places, similar to the Exeter and East Devon Growth Point, it will help investors, businesses, and skilled workers, to know the direction of future development and provide them with confidence if they choose to invest in the city.
- 5.8 Fundamentally, however, knowing and meeting the core commercial and non-commercial needs of businesses and the people that own or manage, and work in them is crucial. In addition, cities that offer attractive lifestyles tend also to be a magnet for key knowledge-based workers and visitors.
- 5.9 Cities project images and messages about the locality. However, in an increasingly complex and competitive world, many people, and businesses are digitally or otherwise connected and simultaneously overloaded with information. They have little time to pay attention to the array of information assailing them. It is difficult for a place to stand out without proactive effort across a range of media.

- 5.10 It is essential that Exeter identifies characteristics closely associated with the city that differentiate it from competitors. Crucially, whatever is done, said, and promoted about the city and its surroundings must be credible and mark it out as the place for investors, businesses, skilled workers, students and visitors. This will form the picture, the basis of Exeter's story and contain its character, its offer, and messages to be conveyed to prospective customers that the city wants and needs to attract.
- 5.11 Such characteristics help to provide the city with a 'sense of place'. Exeter is a place where people and businesses want to be. Of fundamental importance is that people and businesses that may want to be here too, also talk positively about Exeter. It will be essential to secure proactive 'chatter' within and across the networks such as Facebook and Twitter which people now increasingly use to communicate.

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

- 6.1 Exeter has an array of brand and cultural assets that potentially mark out the City's distinctive offer as a place for investors, businesses, skilled workers, students and visitors. A SWOT table has been produced to illustrate some of Exeter's most important visible brand and cultural assets. The city also has a range of "hidden" assets that are perhaps under recognised within the city and its surroundings and probably beneath the radar of people and businesses beyond Exeter and the Heart of Devon. These may need more promotion as a consequence.
- 6.2 Exeter could promote itself based on its brand and cultural assets. There is a strong story to tell. It is to some extent a distinctive offer. However, in the clamour to be heard many locations might be perceived as perhaps being indistinguishable from other cities. It may well indeed be difficult for Exeter to stand out from the crowd, particularly as most other cities emphasise their location for quality of life. There are countless locations in the UK and Europe, let alone on a wider scale, promoting, conceivably, similar things and images to Exeter, such as their University, people at work or study, people involved in outdoor pursuits, and highlighting how easy it is as a place to travel to and from.
- 6.3 It could be said that Exeter's weakness is its lack of a nationally recognised iconic symbol or project that grabs and holds national and international attention and places the city at the forefront of people's minds. Nevertheless, whatever is decided and agreed with partners, without effective promotion and marketing of Exeter's assets – visible and currently hidden – there is danger that Exeter will be passed by or beyond the radar of those investors, businesses, skilled employees and visitors the city may wish to attract. It may well be worth identifying a potential iconic symbol or it may even already exist but we haven't recognised it as such yet.

6.4 - **SWOT Table**

Strengths		Weaknesses
<p><i>Visible Brand Assets</i></p> <ul style="list-style-type: none"> - University of Exeter - The Met Office and Hadley Centre for Climate Change - Pennon Group, EDF Energy, Flybe - Princeshay and the City's expanding retail offer - Devon's quality of life image - Exeter International Airport - Exeter and East Devon Growth Point - Exeter's centrality within the South West and its connectivity to transport routes 	<p><i>Visible Cultural Assets</i></p> <ul style="list-style-type: none"> - Exeter Cathedral, Exeter Quay, Exe Estuary, Exeter Underground Passages - Exeter Royal Albert Museum - City's heritage - Film location for German TV series based on novels by Rosamunde Pilcher - Proximity to – Dartmoor and Exmoor National Parks, Sea and Jurassic and Triassic Coastline, RSPB Nature Reserves, AONB - Exeter Rugby and Football Clubs, Exeter Racecourse and other sporting facilities - Exeter Phoenix, Northcott Theatre, Barnfield Theatre & Spacex and other venues 	<p><i>Brand Assets</i></p> <ul style="list-style-type: none"> - No readily identifiable iconic or internationally known buildings, products or services - Clone city comment in press which still gets mentioned regularly
Opportunities		Threats
<p><i>Promote Hidden Brand Assets (beneath people's radar) e.g.</i></p> <ul style="list-style-type: none"> - University of Exeter's Science Strategy - Exeter City of Science initiative - Chamber EXIST initiative - Exeter's job creation track record & capability - Local knowledge-based services - New scientific and technology companies - Exeter College 	<p><i>Promote Hidden Cultural Assets</i></p> <ul style="list-style-type: none"> - Develop Exeter as a hub for theatre or performing arts or live music in the region. <p><i>Iconic Projects</i></p> <ul style="list-style-type: none"> - identify and develop an iconic project for Exeter 	<ul style="list-style-type: none"> - Promotion by County Council and/or Heart of South West LEP may overshadow or mask the real offer and strengths of Exeter and its surroundings by promoting a generic offer or messages that fail to recognise Exeter as a strong place for investment, business growth and employment.

7 Defining Exeter's Brand

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

7.2 *What do people look for?*

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

- Investors and Businesses
 - o primary considerations – strong local economy, competitiveness of the location in cost, availability, accessibility, availability of skills
 - o secondary considerations – reputation for local support, networking and friendliness and city’s environment and green credentials
 - Workers
 - o primary considerations – vitality and potential as a new place to work, employment and career opportunities, location in the country
 - o secondary considerations – strength of the local economy
 - New residents
 - o primary considerations – safe place to live, near family and friends
 - o secondary considerations – its arts, culture and housing mix, its location
 - Students
 - o primary considerations – that graduates are amongst the most sought after by employers; the University enables students to achieve their highest academic potential
 - o secondary considerations – the social scene, night-life and local term time employment opportunities
- 7.3 Exeter can provide investors and businesses with the confidence of it being a successful, relatively stable economy with identifiable and exciting opportunities for growth against an overall track record to help promote the climate of confidence and credibility required.
- 7.4 It is recommended that Exeter elects to focus on promoting and marketing itself on its track record, its assets and future growth plans as a city economy that offers ‘certainty, confidence and credibility’ to investors, businesses and skilled workers. The offer arising from Exeter and the Heart of Devon also meets secondary human emotional needs, which can contribute to confirming its sense of place, which is so important to raising and stimulating interest in the city.

What are Exeter’s current brand approaches?

- 7.5 Whilst Exeter has a strong mix of brand assets that underpin a potential unified city brand, it is recommended that the existing approaches are further reviewed, ‘Regional Capital’, ‘It’s a capital city’, and ‘City of Science’ have not fully harnessed the essence of Exeter’s strengths and market position in a total city brand approach. There may well be a need for a new and revised brand approach for Exeter to better reflect the need to profile the city as a place offering ‘certainty, confidence and credibility’.
- ‘Regional Capital’ – Exeter has been promoted as the regional capital west of Bristol as a bold statement of its ambition and to reflect the administrative reality and commercial importance of its location; however at a larger scale, Bristol is the undisputed main city. In addition, regional capital, whilst in some ways reflecting the nature of regional headquarters based in Exeter, does not sufficiently clearly portray the essence of the city’s brand and cultural assets.

- 'It's a capital city' – reflects several aspects including Exeter's position as the capital of Devon, the quality of its assets that are reflective of a main urban centre, and also as a "capital" place to live. However, its emphasis is towards promoting imagery that reflects Exeter's quality of life and status. The term capital may also be perceived as old fashioned. As a consequence it does not brand the city as a place of growth or convey the city as progressive and therefore likely to be good for investors, businesses, and employment.
- 'City of Science' – has been a promotional initiative designed to raise awareness of Exeter's strengths and achievements in science and technology beyond its cream tea/cathedral image and its drive towards creating jobs and being a centre for recognised learning in the sciences. In its own right, reflecting some aspects of the city, it is a strong message and good story to tell about what Exeter provides and where it wants to go. Exeter Chamber's new initiative to promote the science and technology sector is likely to play a prominent role in taking this forward.

One city approach

- 7.6 There is now more than ever the need for an approach to branding and promotion that is based on collaboration and commitment to joint approaches to promoting and marketing the city. There are a number of organisations which have a vested interest in the city having a high profile, strong and positive image. In this current climate of more limited resources, there is an even greater imperative to pool effort and resources for maximum results.
- 7.7 There will be a need to gain consensus around the approach, nature and manifestation of the brand.
- 7.8 The ideal position will be when the city is effectively promoted and marketed and where both those here in the city and those beyond its hinterland share comparable positive perceptions of it.
- 7.9 For this to happen, it is essential that key partners and influencers who possess the right skills and approach from Exeter's economic, social, cultural, and environmental organisations work together and share a common focus and commitment to action. Exeter and its key partners should therefore establish a Marketing Alliance of willing and able individuals, firms, and organisations to give their time to commit resources and support the implementation of the Exeter Place Marketing Strategy. Potential partners should be drawn from:
- City and neighbouring local authorities
 - The University of Exeter, Exeter College and Schools (State and Private)
 - Leading businesses and business organisations, cultural and environmental leaders
 - Developers operating in the city and commercial agents
 - The media
- 7.10 This Marketing Alliance will need to agree and adopt this Strategy in order to be wholly involved in projecting the city and its key brand characteristics and messages. A Communication Plan will also be necessary, one that sets out a series of steps to achieve positive perceptions of the Exeter economy.

7.11 The Communication Plan will need to:

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

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

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

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

"Exeter – we've earned our Capital reputation"

- The phrase, **we've earned our Capital reputation**, may be attractive to the target groups the city wants to attract, conjures up imagery of:
 - o Exeter is a capital city and proud of its reputation
 - o Exeter is industrious and a place for a return on investment
 - o Exeter works hard to earn its capital and its reputation

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

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

- **“Exeter – growing capital”**
- **“Exeter – be part of its success”**

8 Action Plan

- 8.1 The implementation of the Strategy will need to ensure it relates to and complements other relevant strategies and plans to avoid duplication but also to achieve even greater impact by drawing on their activities. The appendices list some relevant documents. For example, The Exeter Visitor Strategy is focused on promoting the area as a visitor destination, will convey much about the city’s cultural and environmental assets and the surrounding area, and is aimed at stimulating visitor expenditure. Actions under the Place Marketing Strategy will need to be coordinated and linked to the Visitor Strategy and will use its material as appropriate. It will be important that shared messages are agreed through the Marketing Alliance.
- 8.2 An initial Action Plan has been developed outlining the stages towards agreeing the Strategy and gaining the necessary wide support and commitment to its delivery. More detailed plans will follow.

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

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

	Action	Key Stages
1.	Establish a Marketing Alliance to drive and co-ordinate a one city approach to promotion and marketing	<ol style="list-style-type: none"> 1. Secure commitment from key players across the private and public sector 2. Review the current city branding approach, determine and agree the range of key messages to project and agree an appropriate core brand and the most effective strap line(s) based on achieving a sound and credible portrayal of the city’s relevant strengths. 3. Commit resources to produce and deliver a Communication Plan to be developed through shared activities including developing effective media relations, social networking and events, marketing and budgets 4. Establish with partners across the city economy, effective PR messaging on local, regional, national and international levels 5. involve the development and delivery of workshops designed to work with key groups or organisations to understand the nature and value of their potential contribution and to engage them in promoting and marketing Exeter and its assets 6. Grow the number of Exeter Ambassadors and work with them to produce an effective ‘toolkit’ to assist them in advocating the city as a place for investment, business and skilled workers 7. Draw on local sector knowledge of ‘customer needs’ and where necessary carry out surveys and research to ensure the city gets the right messages to the right people at the right time
2.	Develop, produce and maintain a city wide promotion and marketing website and social media campaign.	<ol style="list-style-type: none"> 1. Agree principles of website’s design and functionality to promote a one city approach incorporating cross marketing links on local partners’ website, social media and other promotional media used. 2. Secure direct and in-kind funding commitment from local private and private sector partners 3. Produce a website design brief and procure local company to design, produce and maintain 4. Develop and deliver complementary promotional campaigns using other digital platforms in the social media and the use of emails to raise the profile of the site.

	Action	Key Stages
3.	Establish specific sector marketing groups from across the city economy to determine the benefits, opportunity and approach to raising the profile of each sector	<ol style="list-style-type: none"> 1. Establish a programme of workshops / groups to determine the value of the approach 2. Determine priority actions for each sector by agreement to support and progress worthwhile initiatives 3. Identify and secure resources to progress the initiative
4.	Establish a task and finish group to target and attract major national and international events to raise Exeter's profile and boost the city economy	<ol style="list-style-type: none"> 1. Scope role, terms of reference and agree a realistic end goal 2. Identify targets and interventions required 3. Produce a deliverable action plan 4. Agree proposals through the Marketing Alliance 5. Implement action plan
5.	Establish a task and finish group to identify and test the feasibility of delivering an Iconic Project beneficial to the city's image and economy	<ol style="list-style-type: none"> 1. Secure commitment from relevant key organisations towards identifying potential projects 2. Scope role, terms of reference and agree a realistic end goal 3. Identify delivery partners and interventions required 4. Produce a deliverable action plan 5. Agree proposals through the Marketing Alliance

	Exeter's strength in depth
	When considering locations within the UK, investors, businesses, knowledge-based workers, students and visitors will look at other locations within and beyond the South West.
	The Strategy used the Chartered Institute of Public Finance and Accountancy's (CIPFA) 'Nearest Neighbour' model and drew on the following indicators to identify the top 15 nearest Unitary Authorities and Non-Metropolitan Districts statistically close to the city by:
	<ul style="list-style-type: none"> - Population - % of population of working age - % unemployment - % daytime net inflow - % day visitors - Offices per 1,000 population - Shops per 1,000 population
	Bristol and Swindon are included in the top 15 nearest neighbours to Exeter using this method, as are Cambridge, Oxford, and Warwick. Plymouth, although not identified within the model, has been included, as it is the largest city by resident size in Devon.
	The results of the comparison illustrate Exeter's strength as a place for employment, for business growth and for investment.
	<i>Exeter's strengths as a place for employment</i>
	<p>In summary Exeter:-</p> <ul style="list-style-type: none"> - has the highest economically active workforce, standing at over 83%. - is in the top 2% nationally for its rate of growth in job creation, 7th highest in the UK, outperforming other cities. From 2000 – 2009 (the latest available data), Exeter created 19,000 additional jobs (+24.4%) In comparison, Oxford added 15,000 jobs, Warwick 11,000, Cambridge and Swindon 5,000 jobs each; Plymouth 4,000, whilst Bristol lost 1,000 jobs. Over this period, EHOD created an additional 34,000 jobs (+16.7%). - was 17th highest across the UK, in terms of total job growth nationally between 2000 and 2009, and compares favourably with much larger cities and employment locations, with for example, Cardiff (+24,000), Sheffield (+22,000) Edinburgh (+21,000), Manchester (+21,000) and Belfast (+20,000).

	<ul style="list-style-type: none"> - is a magnet for employment, outperforming the other cities for job density, which means it has the highest number of filled jobs divided by the number of people of working age resident in the city. The city is a powerhouse of employment opportunities relative to its size. For example, Exeter provides employment for some 13,000 less people than Plymouth, which has more than double Exeter’s resident population. The city has the 10th highest level of jobs density across all of the local authority areas within the UK. - has relatively higher proportions of employment than across England and Wales in the following broad industrial sectors: <ul style="list-style-type: none"> o Construction o Health o Motor Trades o Professional, Scientific and Technical Services o Property o Public Administration and Defence o Utilities
	<p><i>Exeter strengths as a place for business growth</i></p> <p>The city:-</p> <ul style="list-style-type: none"> - has the highest percentage of businesses with a turnover exceeding £1M (over 12%). - has the highest percentage of businesses (44%) that have been trading for 10 or more years. Exeter is a good place do business. - is a competitive city. The median annual gross pay for people employed in the city is £25,000. This is the same as Plymouth. Swindon, Bristol, and Warwick’s median salaries are over £26,000, whilst Cambridge and Oxford respectively stand at around £28,500 and £29,000 per annum. - has the highest self-employment rate, standing at 8.5%. This coupled with high employment rates in the city, might suggest that Exeter is an entrepreneurial city.
	<p>For high value employment, Exeter has the second highest concentration of knowledge based services (KBS) within the South West, slightly behind and second only to Bristol.</p> <p>The majority of Britain’s economic growth comes from...ideas, knowledge and people’s skills...and the businesses service sector has quietly driven the growth of the UK economy. This sector – which includes lawyers, engineering, science and technical activities, IT specialists, and consultants – has thrived because it creates value by providing the ideas and the knowledge that the British economy needs in order to grow (The Works Foundation 2011).</p> <p>Exeter’s particular concentration of KBS employment in comparison to Bristol, Plymouth, Swindon, Cambridge, Oxford and Warwick and England and Wales, is in:</p> <ul style="list-style-type: none"> o Legal activities o Engineering activities and related technical consultancy o Professional, Scientific and Technical activities

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

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

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

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

Exeter as a place for investment

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

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

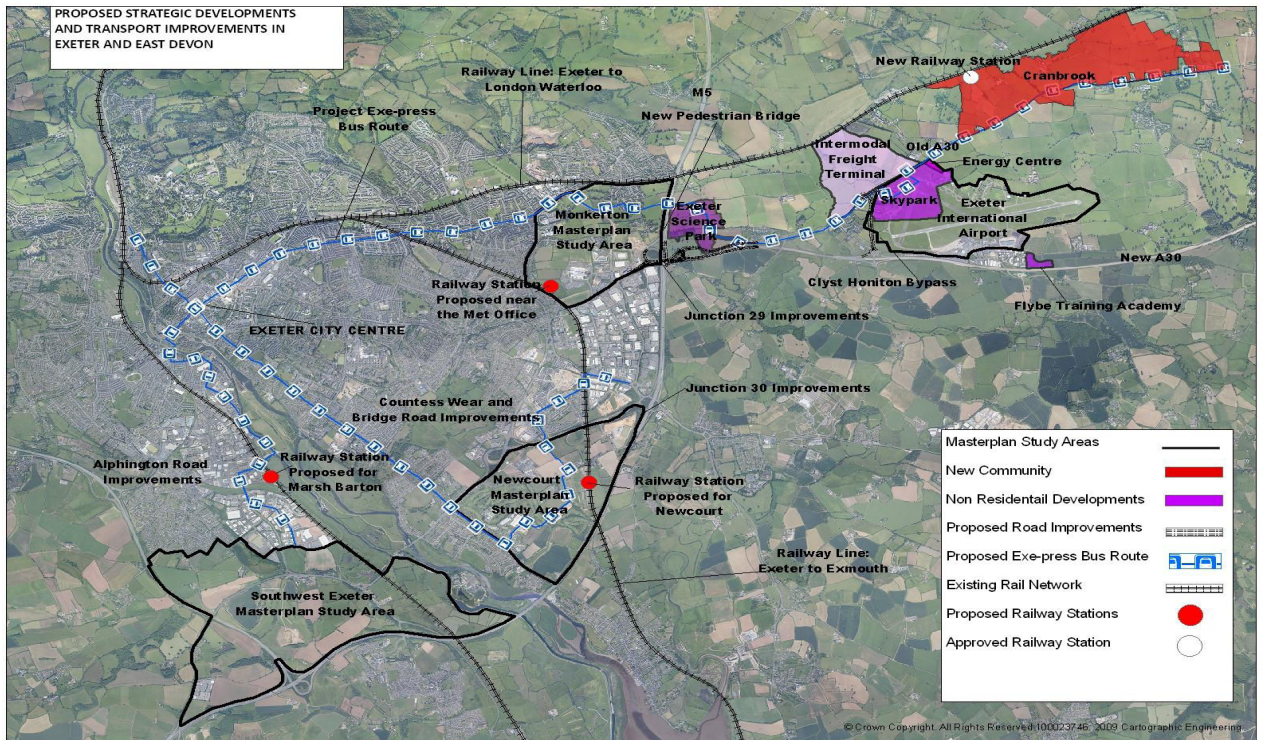
A plan is attached of the Growth Point and its key projects. Growth in employment is forecast to be spread across a number of key sectors as follows:

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

	<p>- <i>Emerging Sectors</i>: these are currently under represented in employment & business terms, but forecast to grow due to Growth Point developments:</p> <ul style="list-style-type: none"> ○ Advanced Engineering – 1,000+ new jobs ○ Bioscience and Health – 1,000+ new jobs ○ Low Carbon & Environmental Goods & Services – 1,000+ new jobs
	<p>The largest development in terms of employment will be the Skypark business park, forecast to generate over 7,500 new jobs. Of these, the majority (over 5,000) will be in Business and Professional Services. The city centre is forecast to create almost half of the 3,700 new jobs in the Hospitality and Retail sectors. The development of Exeter Science Park will result in the majority of new jobs in the Emerging Sectors. The Emerging Sectors only account for approximately 13% of all jobs created by Growth Point developments.</p>
	<p><i>Summary</i></p>
	<p>Exeter has a strong economy. It is successful at creating jobs. The multi-million pound investment within the Exeter and East Devon Growth Point is indicative of the city's strength and the confidence in the area to invest in a 20 year major economic development programme. The University of Exeter is going from strength to strength and is the top 25th fastest growing organisation in the UK and within the top 100 across Europe. Flybe is expanding. John Lewis is opening a new store in 2012 placing Exeter as the second largest retail catchment centre in the South West with more city centre developments to come. Moreover, and building on the forward thinking nature of the city, the University of Exeter's Science Strategy, the development of the Science Park, the City of Science initiative and the Chamber's science and technology initiative, all point towards reinforcing the city's track record of attracting investment, encouraging business growth and creating jobs.</p>

Appendix 2

Exeter and East Devon Growth Point



Quality of life

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

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

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

Appendix 4

CACI 2010 Retail Footprint – Top 50 Centres in Great Britain

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

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

Other South West Retail Centres within the CACI 2010 Retail Footprint

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

Appendix 5

Relevant strategies and plans:

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