

# **Place Marketing Strategy**

## **Exeter Economy**

**2012 – 2016**

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# 1 Executive Summary

- 1.1 The Place Marketing Strategy's purpose is to help underpin the continued growth of the Exeter economy, broadly covered by Exeter, East Devon, Teignbridge, and Mid Devon, known locally as the Exeter and Heart of Devon Economic (EHOD) sub-region.
- 1.2 Cities act as the 'shop window' on the economic performance and attractiveness of a locality. A city projects impressions, images, and messages about itself and its hinterland that can have an important impact on the perceptions of influencers and decision making investors. The promotion and marketing of the local economy – EHOD – would benefit from a direct association around a consistent powerful and effectively delivered set of messages portraying the area as part of the Exeter economy.
- 1.3 The proposed strategic aim is:
- To establish and reinforce Exeter's reputation as the regional capital and principal economy south west of Bristol for attracting investment, successful businesses and skilled workers.
- 1.4 To reinforce Exeter's strong market position it is proposed that this Place Marketing Strategy has four objectives, designed to:
- secure commercial and public sector investment to reinforce Exeter's position as one of the main "power houses" of the South West economy
  - attract new employers and particularly more knowledge-based businesses and entrepreneurs into the city's economy
  - reinforce the area's reputation for having a leading combination of retail, heritage and cultural experiences in an outstanding environment
  - attract and retain skilled workers and graduates
- 1.5 Exeter is the principal economy west of Bristol and has in the last decade outperformed most locations across the UK for job creation, featuring in the top 2% for employment growth.
- 1.6 The city is a large magnet for employment. It has the 10<sup>th</sup> highest level of jobs density across all of the UK's local authority areas providing a large concentration of jobs for its hinterland. Between 2008 and 2010, Exeter was in the top 10 nationally for job creation; all achieved whilst 76% of all locations throughout Great Britain saw job losses.
- 1.7 The UK Competitiveness Index confirmed that Exeter has seen the greatest improvement in competitiveness against all other UK locations. With further significant economic and developments planned and the increased

availability of employment land the Exeter economy is in a strong market position to grow further.

- 1.8 Research undertaken by Experian supports this belief. It 'looked at evidence for growth between 2010 and 2012 in every local authority area in England'. The research shows that 'Exeter in particular performs well in the region and is within the top 10 local authority districts in England' possessing businesses with high growth potential.
- 1.9 Exeter has a strong regional offer – its commercial, administrative, and retail strengths as a regional capital are complemented by the:
  - world class University of Exeter and its research strengths
  - Met Office's focus on climate change
  - Growth Point and other extensive high value employment opportunities
- 1.10 This offer together with the area's reputation for outstanding quality of life, positions the Exeter economy as one of **the** locations for attracting knowledge based businesses. On this basis it is proposed that the city economy is branded: '*Exeter – successful, forward thinking, innovative.*' This approach would complement the Heart of Devon Tourism Partnership strapline emphasis on the quality of life and lifestyle offer portrayed by the offer of '*City, coast & countryside.*'
- 1.11 Whatever is said and promoted about the Exeter economy must be credible and mark it out as **the** place to be. It is not just about sharing and using as far as possible the same logo and a range of strap lines. These have yet to be agreed. The Exeter economy needs as many key local players as possible working together in a common direction in developing and promoting the city. It is about agreeing and sharing common messages and maximising the opportunity for visibility.
- 1.12 The Exeter Marketing Alliance was the first step along this journey that now requires commitment at the highest level to strategic collaboration across a wider range of participants from across the public and private sector.
- 1.13 Collaboration towards the implementation of this Strategy should bring the following dividends, securing:
  - new and additional investment in employment sites, accommodation and professional services
  - new entrepreneurs and business start-ups
  - relocation, expansion or consolidation of employers providing new employment, annual injections of expenditure into the local economy and provide opportunities for local firms to supply products and services
  - the occupation of Exeter Science Park and SkyPark and other key employment sites
  - the attraction of additional skilled workers and potentially increase the retention of graduates
  - additional retail provision and an increase in the volume and expenditure

of visitors and shoppers

- 1.14 In terms of the city's characteristics, Exeter has an array of assets that potentially mark out the City's distinctive offer. However, some appear to be largely 'hidden' beneath people's general perception. Misconceptions need to be countered. The qualities and strengths of the Exeter economy need to be promoted.
- 1.15 Of primary consideration for investors, businesses and skilled workers is their desire for certainty regarding the strength of the local economy, its credibility as a profitable location and its ability as a good place for attracting and retaining skilled workers and developing careers. The Exeter economy provides that certainty and confidence.
- 1.16 The marketing programme proposed recommends three broad categories of activity aimed at raising awareness of the offer through promotional activity, targeting sectors considered by the Exeter Marketing Alliance as important and challenging misconceptions.
- 1.17 The Strategy proposes to establish a range of 'vehicles' to raise awareness of the Exeter economy. These include:
  - establish an effective promotion and marketing website
  - produce an investment prospectus
  - provide or attract national and/or international conferences reflecting Exeter economy's strengths and/or aspirations.
- 1.18 These sectors offer the best opportunities to help local businesses prosper, create jobs and also to grow the Exeter economy. The sectors recommended, which contribute to Exeter's regional capital reputation are:
  - Professional, Scientific and Technology sectors
  - Retail Sector
  - Public Sector
- 1.19 For the targeted marketing and development of the proposed sectors the intention is to draw upon the market intelligence and networks nationally and internationally available from local businesses. This should result in a steady flow of warm leads to follow up. It is the intention of this Strategy to:
  - work much more closely with commercial agents on the promotion of property and sites
  - deliver bespoke seminars to invited sector audiences
  - work with local industry groups enabling them to promote investment, expansions and relocations that benefit their sector.
- 1.20 To influence perceptions and challenging misconceptions about the Exeter economy the Strategy proposes to use and build upon the connections of existing business networks and develop new working and social media relationships.

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

## 2 Introduction

- 2.1 Exeter is the principal economy west of Bristol (see Appendix 1 for more information). In the last decade Exeter has outperformed most locations across the UK for job creation, featuring in the top 2% for employment growth. Growth statistics show that Exeter's job creation outperformed all other cities in the South West and achieved comparable job growth on par with Cardiff, Edinburgh, and Belfast.
- 2.2 The Exeter economy has seen significant investment over the past decade and a pipeline of further investment, over £1bn, is underway. Exeter alone is a strong city, with GDP running at around £3.6bn per annum.
- 2.3 The UK Competitiveness Index 2010, the latest available, confirmed that Exeter has seen the greatest improvement in competitiveness against all other UK locations. The city's local economy continues to attract investment, create new businesses, support and grow existing businesses and draw in high calibre employees. With significant planned economic and retail developments and increased availability of employment land, the Exeter economy is in a strong market position to grow further.
- 2.4 Research undertaken by Experian entitled, 'BBC Local Growth Research' (February 2012) supports this premise. The research 'looked at evidence for growth between 2010 and 2012 in every local authority area in England', demonstrating that Exeter and the Heart of Devon saw above average business growth in these 2 years. 'Exeter in particular performs well in the region and is within the top 10 local authority districts in England' possessing businesses with high growth potential. Such businesses are defined as 'young, small but rapidly expanding growing firms with...entrepreneurial skills, [with an] appetite for business risk and [an] international outlook'.
- 2.5 The Exeter economy is made up of sub-regional and interdependent local economies broadly covered by Exeter, East Devon, Teignbridge, and Mid Devon, known locally as the Exeter and Heart of Devon Economic (EHOD) sub-region.
- 2.6 The Place Marketing Strategy's purpose is to help underpin the continued growth of the Exeter economy and attract and retain investment, new businesses, and skilled workers. All of which, much like the attraction of visitors to the area benefits local businesses across the city, coast, and rural hinterland of the sub-region. Income will be generated for local businesses through construction activity, trading and staff expenditure in the local economy.
- 2.7 Cities act as the 'shop window' on the economic performance and attractiveness of a locality. References to the Exeter economy in the Strategy should be taken as being synonymous with the area's characteristics and attributes that make up EHOD. Exeter as a place name

provides a platform to recognise the collective offer of the local economy.

### **3 Strategic Aim**

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

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

### **4 Strategic Objectives**

4.1 The following objectives are proposed; these also act to define the success criteria upon which the performance of the Strategy and that of the Exeter economy can be assessed. To:

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

### **5 Strategic Collaboration**

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

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

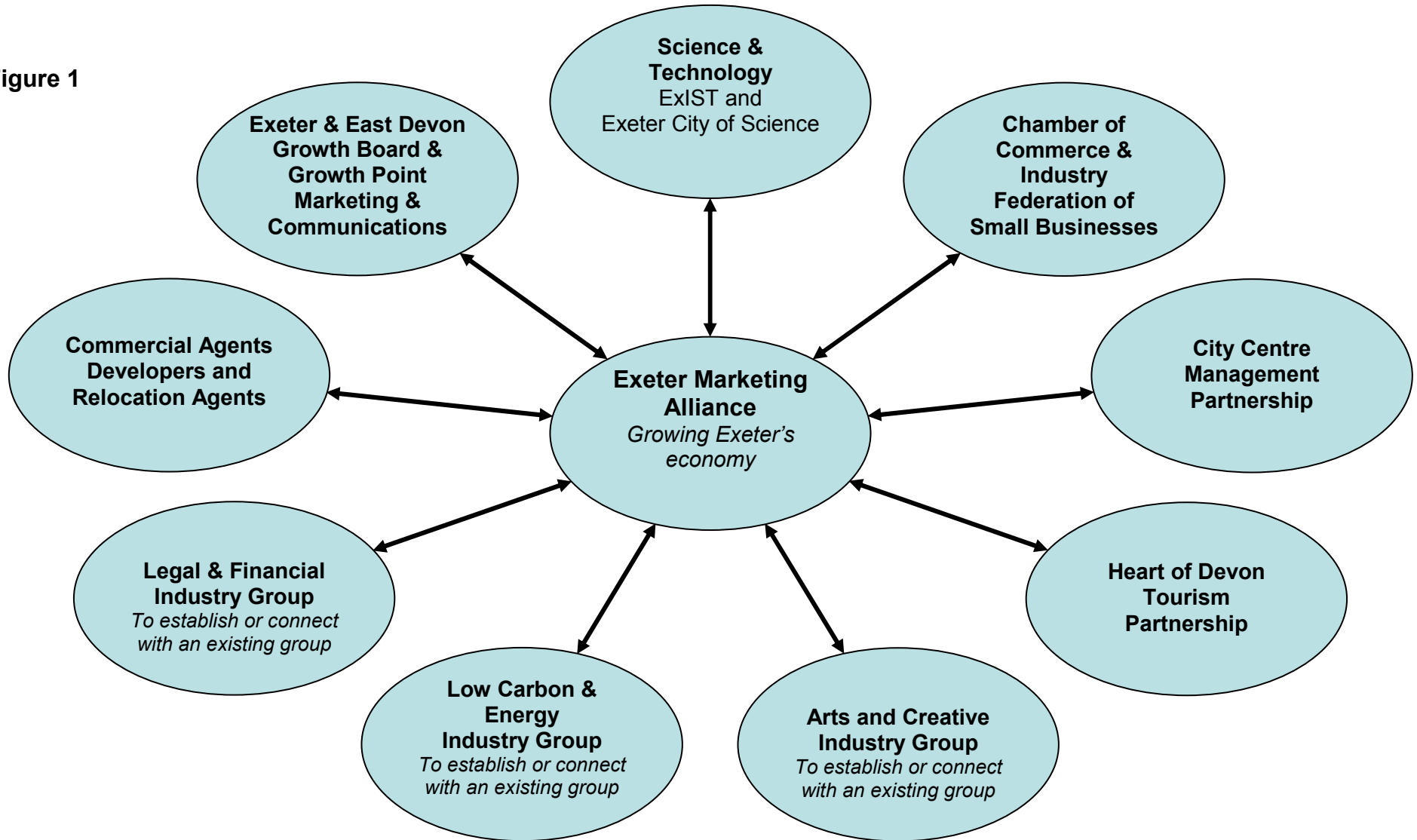
5.3 The ideal position will be when the Exeter economy is effectively promoted and marketed and where both those here in the city and its hinterland and beyond the local economy share comparable positive perceptions of it.

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



- 5.5 Collaborative activity requires a range of proposed participants representing sectors and interest groups to:
- sign up to the Place Marketing Strategy's aims and objectives
  - actively pull in the same direction
  - adopt and adapt key messages to suit their market sector and customer base
  - contribute staff and financial resources to successfully implement the Strategy
- 5.6 Collaboration towards the implementation of this Strategy should bring the following dividends, securing:
- new and additional investment in employment sites, accommodation and professional services
  - new entrepreneurs and business start-ups
  - relocation, expansion or consolidation of employers providing new employment, annual injections of expenditure into the local economy and provide opportunities for local firms to supply products and services
  - the occupation of Exeter Science Park and SkyPark and other key employment sites
  - the attraction of additional skilled workers and potentially increase the retention of graduates
  - additional retail provision and an increase in the volume and expenditure of visitors and shoppers
- 5.7 Figure 1 provides an outline of the groupings of proposed 'industry' participants that are required to work as a part of collaborative activity under the umbrella of the Exeter Marketing Alliance. Tourism development and promotion would remain with the successful Heart of Devon Tourism Partnership.
- 5.8 The role of each group is defined by their own 'industry sector'. However, each group would be expected to work autonomously to promote growth in their area of activity and where relevant work with others to target and attract businesses to relocate and or expand within the Exeter economy.
- 5.9 The Exeter and Heart of Devon Growth Board is an appropriate conduit to endorse and help drive agreement on the Strategy and secure commitment at the highest level on collaboration from the range of participants.

Figure 1



## 6 Place Marketing the Exeter Economy

### *The significance of a 'sense of place'*

- 6.1 Cities project images and messages about the locality and the hinterland. A city's sense of place is engendered principally by – the nature and quality of the physical and natural environment, the layers of history that are its story, the diversity and character of its population and its interdependence with the towns and villages that surround it, and the presence of well-known people and renowned organisations, products or services.
- 6.2 The Exeter economy has a range of characteristics and assets that define how it is perceived and how it compares with other places by those that live, work, study and visit here.
- 6.3 However, in an increasingly complex and competitive world, many people, and businesses are digitally or otherwise connected and simultaneously overloaded with information. They have little time to pay attention to the array of information assailing them. It is difficult for a place to stand out without proactive effort across a range of media.
- 6.4 Increasingly cities and their surroundings use their quality of life assets when competing for investment, business, visitors, and students. The Exeter economy must continue to pay attention to those aspects that are the foundations of its character and continue to improve the use of space and its natural assets.
- 6.5 For example, the report for Exeter, 'A City Centre Vision for a Green Capital' (June 2011) defines a long-term strategic and physical vision for the centre of the city. The paper sets out a framework for taking forward the Exeter Vision, which has defined overarching themes and aspirations for the city. Visions generally precede development. The ingredients within the green capital vision may take some 10 – 20 years or more to achieve. And yet, by providing a clear physical definition for the use of Exeter's space and places, as with the Exeter and East Devon Growth Point, it will help investors, businesses, and skilled workers, to know the direction of future development and provide them with confidence if they choose to invest in the city.
- 6.6 Whatever said and promoted about the city and its surroundings must be credible. Overall, the messages will form the picture, the basis of the Exeter economy's story and contain its character and the offer to be conveyed to prospective customers that the area wants and needs to attract.
- 6.7 Such characteristics help to provide the area with a 'sense of place'. The Exeter economy is a place where people and businesses want to be. Of fundamental importance is that people and businesses that may want to be here too, also talk positively about the area. It will be essential to secure proactive 'chatter' within and across the networks such as Facebook and Twitter which people now increasingly use to communicate.

## **Market Position**

- 6.8 In 2012 Exeter's retail offer was ranked 30th within Great Britain. John Lewis opens a new store in the city in 2012. Exeter aspires to be positioned as the 25th largest retail catchment following the completion of the mixed use redevelopment of the Exeter Bus and Coach Station.
- 6.9 Compared to other notable locations, Bristol, Plymouth, Swindon, Cambridge, Oxford, and Warwick, Exeter has the highest percentage of businesses with £1m+ turnover and also the highest percentage of businesses trading for 10+ years. Importantly, as a place for knowledge based businesses, Exeter has a particular concentration of employment across professional, legal, scientific, engineering, and technical activities and as a hub for professional services in the region offers comparable quality to London competitors but at greater value for money.
- 6.10 The University of Exeter, recognised as being in the top 1% across the world for international research is going from strength to strength. It has recently been recognised as a member of the Russell Group of Universities. The University's investments since 2007 have positioned it in the top 100 fastest growing organisations in Europe and in the top 25 within the UK. In fact the University's trajectory anticipates that by 2013 they will be contributing over £480M of additional economic benefit to the economy.
- 6.11 The multi-million pound public and private sector investment partnership which is working well together within the Exeter and East Devon Growth Board, a 20 year major economic development programme, is indicative of the economic strength and the confidence in the area (see Appendix 3).
- 6.12 In terms of sector led growth, research undertaken by Experian anticipates growth over the short and medium term within the financial and business service sector. This is particularly good news for the Exeter economy which has many strengths within these activities.
- 6.13 Experian define activities and services making up this sector as including:
- media activities
  - computing and information services
  - finance, insurance and pensions
  - real estate
  - professional services
  - administration and supportive service activities
- 6.14 In pursuing a growth agenda it is important to assess the particular strengths of Exeter's economy as it will help local partners decide where they need to devote time and energy to make best use of finite resources.
- 6.15 In terms of the area's strengths and weakness, as portrayed by examples in the table over leaf, the Exeter economy has an array of brand and cultural assets that potentially mark out the area's distinctive offer as a place to be.

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

Strengths		Weaknesses
<p><b>Visible Brand Assets</b></p> <ul style="list-style-type: none"> <li>- University of Exeter</li> <li>- The Met Office and Hadley Centre for Climate Change</li> <li>- Pennon Group, EDF Energy, Flybe, Supercat, Goodridge, Graphic Plc, ATASS, Heathcoat Fabrics, Centrax, Thomson Reuters, Peninsula College of Medicine and Dentistry,</li> <li>- Princesshay and the City's expanding retail offer</li> <li>- Devon's quality of life image</li> <li>- Exeter International Airport</li> <li>- Exeter and East Devon Growth Point</li> <li>- Exeter's centrality within the South West and its connectivity to transport routes</li> </ul>	<p><b>Visible Cultural Assets</b></p> <ul style="list-style-type: none"> <li>- Exeter Cathedral, Exeter Quay, Exe Estuary, Exeter Underground Passages</li> <li>- Exeter Royal Albert Memorial Museum</li> <li>- City's heritage</li> <li>- Film location for German TV series</li> <li>- Proximity to – Dartmoor and Exmoor National Parks, Sea and Jurassic Coastline, RSPB Reserves, AONB's</li> <li>- Exeter Rugby and Football Clubs, Exeter Racecourse and other sporting facilities</li> <li>- Exeter Phoenix, Northcott Theatre, Corn Exchange, Barnfield Theatre &amp; Spacex and other venues</li> </ul>	<p><b>Brand Assets</b></p> <ul style="list-style-type: none"> <li>- No readily identifiable iconic or internationally known buildings, products or services</li> <li>- Clone city comment in press which still gets mentioned regularly</li> </ul>
Opportunities		Threats
<p><b>Promote Hidden Brand Assets</b> (beneath people's radar) e.g.</p> <ul style="list-style-type: none"> <li>- University of Exeter's Science Strategy</li> <li>- Exeter City of Science initiative</li> <li>- Chamber EXIST initiative</li> <li>- Exeter's job creation track record &amp; capability</li> <li>- Hub of professional and knowledge-based services</li> <li>- New high growth potential scientific and technology companies</li> <li>- Exeter College</li> </ul>	<p><b>Promote Hidden Cultural Assets</b></p> <ul style="list-style-type: none"> <li>- Develop Exeter as a hub for theatre or performing arts or live music in the region.</li> </ul> <p><b>Iconic Projects</b></p> <ul style="list-style-type: none"> <li>- identify and develop an iconic project located in the Exeter economy</li> </ul>	<ul style="list-style-type: none"> <li>- 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.</li> </ul>

## 7 Sector Strengths

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

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

7.2 The majority of Britain's economic growth comes from knowledge based services (KBS)...ideas, knowledge and people's skills...and the businesses service sector has quietly driven the growth of the UK economy. This sector – which includes lawyers, engineering, science and technical activities, IT specialists, and consultants – has thrived because it creates value by providing the ideas and the knowledge that the British economy needs in order to grow<sup>1</sup>.

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

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

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

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

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

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<sup>1</sup> The Work Foundation (2011) 'Britain's Quiet Success Story - Business Services in the knowledge Economy'

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

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

## **8 Target Opportunities**

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

### ***Professional Services, Science and Technology***

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

### ***Retail***

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

### ***Government Departments and Quangos***

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

## ***Professional, Science and Technology Sectors***

- 8.2 Businesses and investors in science and technology away from Exeter may well be unaware of the:
- acclaimed research strengths and the connections and support for industry available from the University of Exeter
  - range of support provided through the Innovation Centre under the umbrella of Exeter Business Support for start ups and young high growth businesses
  - breadth and depth of skills, knowledge, and technology available locally promoted by the recently founded Exeter Initiative for Science and Technology (ExIST).
- 8.3 Like Bristol, Exeter needs to be seen as a hub for professional services in the region offering comparable quality to London competitors but at greater value for money.
- 8.4 It is essential to show clearly how well connected Exeter is through its communications and business networks and the realisable bottom line profit and loss benefits of operating here.
- 8.5 To secure growth the Exeter economy needs to attract:
- companies and start-ups with high proportion of investment in intellectual property
  - hi tech industries, research and development focused and precision manufacturing
  - information technology based companies with significant bias towards development and/or use of hardware, software including cloud-based computing for the provision of services for their clients, e.g. smartphone and wireless apps., for business and individual consumers
  - regional offices/headquarters of large multi-national firms to enhance Exeter's regional capital profile and also to use their presence and connections to facilitate access to overseas markets and provide opportunities for local businesses to provide their goods and services
  - the interest of sophisticated global investors such as Blackstone, New Enterprise Associates (NEA), Accel and Hansberger
  - firms starting up or specialising in –
    - biosciences and food security
    - medicine and healthcare
    - climate change adaptation and the environment
    - data management and statistical predictive analysis
    - new functional materials and photonics
  - marine-related employers (Exeter has above average regional levels of employment in this sector)



### ***Retail Sector***

- 8.6 The High Street retail offer across the UK is exposed to the vagaries of consumer shopping habits and the growth in on-line shopping. However, Exeter's position in the national retail hierarchy is significant. It contributes to the city's reputation as a regional capital and as a place offering a high quality of life. With a retail catchment of over 1 million people, Exeter's potential to expand its offer is a genuine and realistic opportunity.
- 8.7 As a result of delivering planned developments in the city, more people will choose the city as a shopping destination. The physical size of the retail offer will increase over the next 5 years, widening employment opportunity, and creating more local career pathways for employees.
- 8.8 Other aspects of Exeter and the surrounding area provide real opportunities for the retail sector and attract visitors, residents, and businesses into the Exeter economy and helps create a sense of place. These are accommodation and food services and the range of art and culture available. The latter plays a particularly important role in helping to shape the distinctiveness of the area's offer, offering opportunities for people to join in, to socialise, to create and engage in community life.
- 8.9 To secure growth and expansions in the retail sector, there is a need to:
- demonstrate long term sustainable planning for growth in the local, regional and visitor markets, with measurable targets against which progress can be assessed
  - set out within the new City Centre Strategy what is happening now, the planned activities for the next 5 years including what will be done to help the sector grow and improve customer service and the opportunities that will bring
  - influence London and Bristol based agents representing major retailers to visit/revisit Exeter and provide them with information to put the city on the required location list for retailers
  - support the development and promotion of the tourism, arts and cultural sectors

### ***Public Sector***

- 8.10 Government Departments and Quangos have hitherto been on the direct marketing activities of the local authorities co-ordinated by the City Council within EHOD. There have been some successes, most notably, the public and private sector partnership that secured the relocation of the Met Office.
- 8.11 With the forecast loss of some 750,000 jobs nationally across the public sector, it might not be considered that an appropriate target to pursue actively.
- 8.12 However, with the public sector's drive on cost control there may well be opportunities to secure those that seek to achieve consolidation of operating

efficiencies by their deployment around the country. The question of further relocations of public sector organisations out of the South East to save on long term costs to the public purse have been raised more frequently in recent months.

- 8.13 Whilst relocation activity has been quiet of late, previous research undertaken on behalf of the then Labour Government, the Lyons Review suggested that Exeter is in a strong position to attract further and/or replacement public sector employment.
- 8.14 To be in a position to seize opportunities to secure growth, relocation and/or consolidations in the public sector, the Exeter economy needs to:
- demonstrate the:
    - quality and accessibility of specific sites and buildings and the tangible cost benefits of being here
    - range of career paths available across the sector within the Exeter economy
  - work with prominent local public sector employers to approach key government departments and contacts and seek to secure a steady flow of Government VIPs and Civil Servants for Exeter economy site visits

#### ***Attracting entrepreneurs and skilled workers***

- 8.15 The University of Exeter and the local FE colleges reinforce the position of Exeter as a place to live, work, study in, and visit. Continuing to attract students and retain their knowledge and expertise also adds to the mix of cultural activities generated by them. Moreover, they are a source of potential graduates to recruit or start up their own businesses.
- 8.16 Often skilled, creative, and/or young people are crucial for helping to drive growth in a local economy. These people are highly mobile and discerning in choosing their locations. It is critical they are attracted to Exeter to study, secure employment, or start up their own business to help spur growth.
- 8.17 Their decision making is shaped by the quality of place; they will have particular interest in the cultural landscape, the ambience, and buzz of life in the city and the diversity and distinctiveness of the locality.
- 8.18 To attract them to the Exeter economy, there is a need to:
- promote the range of career opportunities to create the perception of the area as a place where graduates/skilled employees can readily stay and progress their career
  - promote the lifestyle of studying, living and working here including the breadth of the arts, culture, leisure, sporting, outdoor activities and adventure and easy access to natural environments

## ***Entrance Points***

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

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

## **9 What are the Exeter economy's selling points?**

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

9.2 Demonstrating the Exeter economy's:

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

9.3 Messages need to convey:

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

## ***Background information – supporting the offer***

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

## ***Positive and negative perceptions***

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

## ***Defining a Brand***

- 9.6 In order to confirm or develop a brand for the Exeter economy, like any other branded product or service, it is necessary to consider how its brand characteristics and assets relate to hard commercial considerations or sometimes, human emotional needs that drive decision making and influence how people might perceive it as a place to be.

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

For investors and businesses, their:

- primary considerations are for a strong local economy, the competitiveness of the location in terms of cost, site availability, accessibility and the pool of available skills
- secondary considerations are for a place with a reputation for local support, networking and friendliness, the quality of its environment and green credentials

For skilled workers their :

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

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

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

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

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

**'Exeter – successful, forward thinking, innovative.'**

- 9.12 This brand statement should convey the promise of added value from the essence of the character and brand assets of the Exeter economy.
- 9.13 The approach complements the Heart of Devon Tourism Partnership offer emphasising and promoting the quality of life and lifestyle of the area. It also brand confusion, allowing both to sit together side by side and providing a rounded vision of the place:

**‘Heart of Devon – City, coast, countryside.’**

- 9.14 The current strap lines used to promote the Exeter economy are important messages that underpin the ‘offer’. They are designed to appeal to specific audiences and sectors. In these fast changing times and advances in communication technology and techniques, active use of the different media and social media can influence perceptions. Provided credible statements are generated, there may be every reason to have a limited range of additional/alternative short-term strap lines that also capitalise on contemporary issues and concerns.
- 9.15 The issue of imagery to be associated with strap lines promoting the Exeter economy has yet to be decided. Appendix 5 contains copies of the imagery used for Exeter and also for Exeter and the Heart of Devon together with some proposed strap lines to promote the assets and characteristics of the area. Further discussion will be required to agree the preferred way forward with the imagery and agreed strap lines.
- 9.16 It will be necessary to underpin each strapline and key messages with a series of narratives that tells part of a story about the Exeter economy to attract interest from the Strategy’s target audiences.

## **10 Marketing Programme**

- 10.1 Members of the Marketing Alliance have offered to provide some staff resources towards the implementation of the Strategy. How this will be harnessed and utilised will be explored once the Strategy, the key messages and target audiences have been agreed.
- 10.2 The proposed activities to promote the Exeter economy are set out within the marketing programme. Three broad categories of activities are proposed as listed below.

***Promotional – raising awareness of Exeter’s offer***

- 10.3 It is intended to establish a range of ‘vehicles’ to raise awareness of the Exeter economy as summarised below:
- establish a dedicated but extensively linked and regularly refreshed and updated promotion and marketing website incorporating the successful “fly-through” approach
  - prepare an investment prospectus to be available electronically and in

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

***Targeted Marketing – key sectors to help grow the economy***

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

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

***Perception Altering – challenging misconceptions***

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

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

### ***Generating leads for targeted marketing***

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

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

### ***Lead management***

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

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

## **11 Performance indicators**

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

### ***Activity:***

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



**Outputs:**

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

**Outcomes:**

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

**Exeter Economy Marketing Programme Action Plan**

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

## Exeter Economy Marketing Programme Action Plan

	Activity	Timescale	Responsibility	Budget	Outcomes/Outputs
2	Produce an area investment prospectus including setting out: - <ul style="list-style-type: none"> <li>• what is happening now, the planned activities for the next 5 years and the opportunities that capture the key strategic development and investment opportunities around the city</li> <li>• outline plans to improve the economic environment and infrastructure required to support the growth generated by these opportunities</li> </ul>	Year 1	EHOD local authorities, Growth Point Team and local commercial agents and developers	£5,000	Provides investors and business with information to stimulate their interest in the Exeter economy; Provides new business start ups with vision of emerging opportunities in the Exeter economy  Encourages investment, start ups, expansions, and relocations into the Exeter economy.
3	Publish and make widely available details of support available and how it is coordinated locally to help 'businesses' move to the area	Year 1	Exeter City Council	£1,000	Provides easily accessible information in one place of the local partnership and soft landing support available; promotes confidence in the area's ability to assist major moves into the Exeter economy
4	Drawing on the PR support offered by members of the Exeter Marketing Alliance prepare and produce jointly editorial for professional and trade sector websites, magazines and national features in the 'broadsheets'	Year 1	Exeter Marketing Alliance Growth Point Team	£6,000	Promotes awareness of the strengths and attractions of the Exeter economy and raises profile to key decision makers and influencers; secures press coverage regionally and nationally
5	Drawing on the PR support offered by members of the Exeter Marketing Alliance use local radio with its London base to reach principally, skilled workers and develop and promote family friendly messages about the Exeter Economy	Year 2	Exeter Marketing Alliance	£4,000	Promotes awareness of the strengths and attractions to local audiences and reaches out to potential skilled workers, key decision makers and influencers in London; encourages an increase in start up, business and relocation enquiries
6	Work towards establishing an international conference in Exeter for key sector businesses, multi-nationals and governments which addresses a significant global issue of which the city has world class strengths and advertise a call for papers and speakers	Year 3	Leading key employers, University of Exeter	£40,000	Potential to put the Exeter economy on the radar of investors and businesses and could be promoted as a proxy iconic project; encourages an increase in start up, business and relocation enquiries; secures press coverage nationally and potentially internationally.

## Exeter Economy Marketing Programme Action Plan

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

## Exeter Economy Marketing Programme Action Plan

	Activity	Timescale	Responsibility	Budget	Outcomes/Outputs
<b>Perception Altering – challenging misconceptions</b>					
12	'Recruit' additional high profile business ambassadors prepared to champion and talk about the strengths of Exeter through their national and international range of business connections	Year 1	Private Sector Partners in the Exeter Marketing Alliance	£0.00	Increase in capability to reach key decision makers and influencers; added credibility of messages received from trusted businesses; encourages investment, expansion and relocations
13	Influence London and Bristol based agents representing major retailers to visit/revisit Exeter and provide them with information to put the city on the required location list for retailers	Year 1	Exeter City Centre Partnership supported by the Exeter Marketing Alliance	£0.00	An effective means of changing perceptions; persuading some to consider the Exeter economy as a place to commit their client's resources; secures new and additional retail investment
14	Establish an Exeter You Tube Channel containing an array of 90 second video case studies of local businesses and key stakeholders produced by local creative media students	Year 1	Exeter College supported by Teignbridge District Council's film unit	£5,000	Showcase for local businesses; promotes awareness of business benefits of operating in Exeter economy; encourages an increase in start up, business and relocation enquiries
15	Establish an Exeter Facebook page targeted at attracting and influencing young skilled workers and entrepreneurs to study, stay and work or start a business in the Exeter economy and <ul style="list-style-type: none"> <li>• promote the range of career opportunities in the Exeter economy</li> <li>• promote lifestyle through linking into information on the arts, culture, leisure, sporting, outdoor activities and adventure and the access to natural environments</li> </ul>	Year 1	University of Exeter, Exeter College, Innovation Centre, Young High Growth Companies, State and Private Schools Heart of Devon Tourism Partnership	£3,000	Encourages young people and graduates to stay and work/start a business here; encourages a source of skilled and knowledge based labour to work for local employers; encourages interest from entrepreneurs to start up/expand/relocate to the Exeter economy

### Exeter Economy Marketing Programme Action Plan

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

**Exeter Economy Marketing Programme Action Plan**

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

## Appendices

### APPENDIX 1

#### Key points about the Exeter economy

#### Did you know that Exeter...

1. is the principal economy west of Bristol
2. attracts between 700 and 1,000 enquiries every year from businesses looking to expand or relocate into its economy
3. has a retail offer ranked as one of Great Britain's top 30 retail catchments and is one of only 10 designated Retail Centres across G.B.
4. aspires to be ranked 25<sup>th</sup> largest retail catchments across Great Britain following the completion of the mixed use redevelopment of the Exeter Bus and Coach Station.
5. has above England and Wales average concentrations of employment in:
  - construction
  - utilities
  - motor trades
  - property
  - professional, scientific and technical activities
    - legal services
    - other professional, scientific and technical activities
    - research and experimental development in social sciences
    - engineering activities and related technical consultancy
  - public administration and defence
6. is a hub for professional services in the region offering comparable quality to London competitors but at greater value for money



7. is home to one of the world's top 1% of universities, one which is the 25<sup>th</sup> fastest growing business in the UK and actively works with industry and supports innovation and innovative businesses
8. is an easy place to make business connections
9. is a large magnet for employment, being ranked in 10<sup>th</sup> position overall across all of the local authority areas within the UK for providing a large concentration of jobs for its hinterland
10. from 2000 to 2009 was the 7th fastest growing city in the UK for job creation, which together with its economic area created over 34,000 jobs, outperforming cities like Edinburgh, Cardiff, Belfast, Sheffield and Manchester
11. continued to increase employment by 7,600 between 2008 and 2010, placing it in the top 10 nationally; all achieved whilst 76% of all locations throughout Great Britain saw job losses?
12. research undertaken by Experian entitled, 'BBC Local Growth Research' (February 2012) shows that 'Exeter in particular performs well in the region and is within the top 10 local authority districts in England' possessing businesses with high growth potential
13. will see a net increase of 26,000 jobs arising from the development of the Exeter and East Devon Growth Point. These are forecast to be in:
  - Business and Professional Services – 11,000+ new jobs
  - Retail and Hospitality – 3,500+ new jobs
  - Transportation and Logistics – 3,000+ new jobs
  - Food and Drink – 1,000+ new jobs
  - Construction and Building Services – 900+ new jobs
  - Advanced Engineering – 1,000+ new jobs
  - Bioscience and Health – 1,000+ new jobs
  - Low Carbon & Environmental Goods & Services – 1,000+ new jobs

14. has over a billion pounds worth of private and public sector investment planned within the Growth Point to develop two regionally important employment sites, including Exeter Science Park and a new eco-friendly market town – Cranbrook
15. is an accessible city at the centre of the South West, is eight miles across, 2 hours from London by train, has two main railway lines to London, the Midlands and the North, and is only 10 minutes drive time to Exeter's International Airport?
16. is renowned for a high quality of life with easy access to an outstanding natural environment – the Exe Estuary, two moors – Dartmoor and Exmoor, rolling countryside, designated Areas of Outstanding National Beauty and internationally recognised coastlines
17. has a clear vision to further enhance its credentials by transforming its offer to be the green capital of the South West
18. has a 'can do' attitude and a workforce that is recognised as being loyal, hardworking, stable and versatile

**Current Representation on the Exeter Marketing Alliance (EMA)**

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

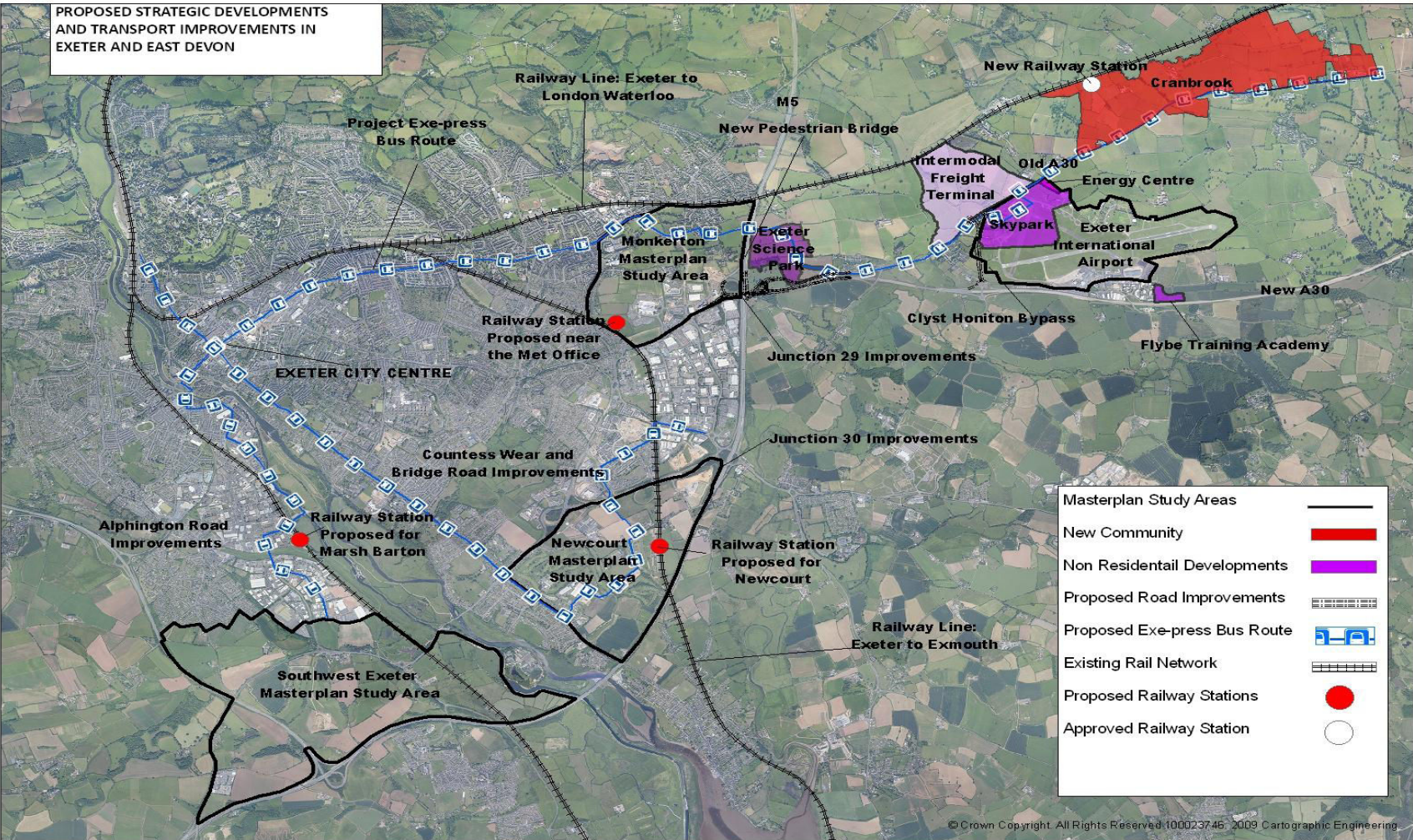
**Gaps in Representation**

- Flybe

**Suggested additional representation arising from current EMA**

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

Exeter and East Devon Growth Point



***Positive Perceptions***

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

## ***Negative Perceptions***

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



**Exeter**

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



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

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

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

## Exeter and Heart of Devon

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



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