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

1: Introduction

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

2: Previous Strategy

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

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

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

Development

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

'Retail' Investment

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

Travel/Access

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

Improvements for Pedestrians

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

Economic Performance

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

Visitor Attractions/Improvements

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

3: Current Position

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

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

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

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

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

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

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

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

Aim 4 – achieving an even safer environment,

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

Aim 5 – securing a vibrant, welcoming and safe evening economy

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

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

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

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

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

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

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

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

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

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

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

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

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

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

1 – Securing and building on Exeter City Centre's competitive advantage

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

2 – Giving a better first impression

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

3 – Delivering a vibrant centre which offers attractions for all

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

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

4 – Achieving an even safer environment

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

5 – Securing a vibrant, welcoming and safe evening economy

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

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

4: Aiming To Turn Vision Into Reality

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

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

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

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

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

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

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

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

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

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

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

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

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

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

4.8 ***<u>'A Sense of Arrival.</u>*** A number of key gateways in to the City Centre currently fall short of providing the best possible first impressions of the City Centre.

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

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

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

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

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

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

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

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

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

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

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

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

Section 5 – Action Plan

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

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

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

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

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

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

Project	**Year**	**Lead Partners**	**Cost Estimate**	**Outcomes**
Top 10 problem premises – regular review and publication of information. A willingness of Responsible Authorities to seek formal reviews where appropriate	On-going	Devon & Cornwall Police Exeter City Council	Minimal cost	To secure the safest possible evening economy environment, ensuring a positive reputation for the City Centre as a visitor destination during the evening and night-time period.
To examine the potential of Early Morning Alcohol Restriction Orders	2014	Devon & Cornwall Police Exeter City Council City Centre licensees City Centre businesses	Costs to be identified, but likely to be significant. Implementation would be likely to result in significant savings in relation to policing costs and cleansing/maintenance costs	A new power that should be considered. Likely to reduce 'pre-loading'. Significant improvements anticipated in safety – and perceived safety – of City Centre. Anticipated impact on broadening-out the attractiveness of the City Centre at night to the widest possible cross-section of the community.
H_20 Project	2013 On-going development	Devon & Cornwall Police Exeter City Council City Centre businesses	Minimal cost – to be met by individual businesses	Evidence form other locations is that water machines offering free water to customers has a significant impact in reducing drink related anti-social behaviour and crime. An initial trial has been successfully run in the City Centre, with the trial achieving such success that it's being used as a model for Devon-wide action. The objective is now to broaden the benefit in Exeter by ensuring city-wide take-up in clubs and pubs.
Taxi Rank Provision	On-going	Devon County Council Devon & Cornwall Police Exeter City Council	Costs to be identified	Rank location, size and management have a major proven impact on safe and efficient dispersal of late-night economy users.

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

Appendix A

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

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