

**A City Centre Strategy for Exeter
2013-2022**

**Building on a Decade of Change –
Delivering a Competitive and
Attractive City Centre**

Final Draft August 2013

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EXECUTIVE SUMMARY

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

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

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

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

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

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

BACKGROUND

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

- Exeter is an employment hub. In terms of job density where the number of jobs in an area is divided by the number of working age residents, Exeter outperforms most UK locations for job density and is positioned 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;
- Employment growth in Exeter during 2008-2010 stood at 4.3%, compared to -6.4% in Plymouth, -0.7% in Bristol and -0.9% in the South West as a whole;
- During 2012, the Royal Albert Memorial Museum was named Museum of the Year (The Art Fund), the University of Exeter was named University of the Year (The Sunday Times) and Exeter College was named College of the Year (Times Educational supplement).

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

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

CACI uses a number of measures to rank UK centres:

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

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

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

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

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

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

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

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

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

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

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

City Centre Strategy 2007-12

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

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

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

- ***Development***
 - Princesshay development completed – and a successful launch period followed-up with continuing healthy trading;
- ***'Retail' Investment***
 - the opening of John Lewis;
 - the opening of a range of other key retailers including Hollister, Cath Kidston, Urban Outfitters and Jack & Jones;
- ***Travel/Access***
 - the refurbishment of King William Street Car Park – and its re-opening as John Lewis Car Park;
 - an increase in use of both Stagecoach bus and Park & Ride services and the First Great Western Tarka & Avocet lines (Exmouth – Exeter passenger numbers (Avocet Line) grew by 32.4% between 2006/07 and 2011/12 and Barnstaple – Exeter passenger numbers (Tarka Line) grew by 73.2% between 2006/07 and 2011/12;
- ***Improvements for Pedestrians***
 - the delivery of a bigger pedestrianised zone at the heart of the City Centre – creating a much more pedestrian-friendly shopper and visitor environment;
 - pedestrian improvements in Paris Street – delivering better connectivity between High Street and Sidwell Street & the Bus Station;
 - pedestrian improvements and delivering a significantly improved environment in Sidwell Street;
 - the delivery of a more pedestrian-friendly Cathedral Yard and Close;
 - the delivery of significant improvements in High Street – making the area a much more attractive shopping environment;
- ***Economic Performance***
 - retail vacancy rates remaining consistently better than the national position, with current rates running at approximately half the national average;
- ***Visitor Attractions/Improvements***
 - significant progress on the delivery of City Centre café culture – with an increase in the number of City Centre cafes and restaurants and a marked increase in the volume of outside seating in areas across the City Centre;

- the re-opening of the Royal Albert Memorial Museum (RAMM), after an extensive – and much praised - refurbishment (and the awarding of the Museum of the Year 2012 to RAMM);
- the opening of two new City Centre hotels, Southernhay House and The Magdalen Chapter, and the opening of a new Premier Inn at St David's Station;
- the opening of Exeter Visitor and Tickets within the Princesshay development and the opening of a new visitor centre for the city's Underground Passages.

Vision for a Green City Centre

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

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

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

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

- The Development to the east of the city wall adjacent to Princesshay provides a significant opportunity for further City Centre investment and development (the East Quarter);
- The Bus and Coach Station is one of the key arrival points into the city and redevelopment of the East Quarter will need to incorporate a re-developed bus station offering a much improved arrival experience. Not only will the redevelopment of the 'Bus Station' site offer a state-of-the-art new transport interchange, the site offers the city the opportunity to deliver a significantly enhanced City Centre leisure offer and the best possible gateway in to the City Centre;
- There are a number of different potential forms new East Quarter development could take. Work on moving development forward has already commenced with enhancement of the Paris Street/Sidwell Street junction. There is potential for further improvement of public space at the Paris Street/Sidwell Street junction and for significant further enhancement of Sidwell Street;
- Beyond Cheeke Street there would be a transition in character between the new city quarter and 'St Sidwell's' – a mixed-use quarter with a reduced scale, local and specialist shopping facilities, food and drink outlets and student accommodation.

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

- In particular, blocks to the west of South and North Streets and the Harlequins Shopping Centre off Paul Street are prime city centre locations that have the potential for significant improvement;
- Whilst commercially successful, the Guildhall Shopping Centre is a very large 'inward looking' development which has blank facades facing out on to two strategically important streets (North Street and Paul Street) and blocks attractive views towards the City Centre;
- Investment in the Guildhall area is a critical second "Big Move". Guildhall development is critical in balancing changes proposed in the East Quarter.

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

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

'A Sense of Arrival'. A number of key gateways in to the City Centre currently fall short of providing the best possible first impressions of the City Centre.

- At present Western Way creates a physical barrier between the City Centre and neighbourhoods in the south-east. Equally, the arrival experience from central rail and bus stations is poor, with surface car parking and a narrow alleyway providing the initial route to the City Centre from St David's Station and a poor environment to the front of Central Station. The bus station is unattractive and surrounded by post-war development in need of redevelopment.
- Opportunities exist for the creation of new public space and development to the front of St David's Station. At Central Station there are plans for the creation of a new pedestrian-friendly forecourt. Delivery of an excellent Bus Station will be achieved within the context of East Quarter development.

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

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

WHERE ARE WE NOW?

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

There is a fantastic level of support within the city community for the growth, development and strengthening of the City Centre – essential as the City Centre has to respond to the local and national economic challenges and structural change within the retail and leisure sectors. In continuing to drive the City Centre forward it is important that we build upon the existing strengths of the City Centre as set out in the bullet points below under the broad aims of the new strategy:

Aim 1 – A sustainable, resilient and competitive City Centre – as it

- delivers a good – and constantly improving – mix of national brand names and an excellent range of unique and independent retailers;
- has an extensive catchment area;
- is compact and relatively easy to access, with rail services, bus provision, Park and Ride facilities and good cycle network;

Aim 2 – A vibrant City Centre which offers attractions for all – the city

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

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

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

Aim 4 – A better first impression – the City Centre has

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

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

- the city is perceived as clean – but there needs to be an improvement in how well maintained and clean our public spaces are.
- the city can lay claim to ‘safe city’ status, with low crime rates and a focus on partnership working to drive crime rates down still further;

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

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

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

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

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

- 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.
- 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;

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

Exeter City Centre, as with other UK town and city centres, has immeasurable social as well as economic value. With the City Centre acting as a shop window for the city as a whole, some of the underlying social challenges that the wider community faces present themselves in the City Centre and a strong City Centre economy is only possible if based on a strong community. The challenge of excessive alcohol consumption and the impact that has on at least perceptions of safety in the evening is an increasing issue for the community as a whole. A key area for action during the lifespan of the Strategy will be Aim 3 (securing a vibrant, welcoming and safe evening economy), with particular progress needed on this front to ensure the City Centre positively projects the city as a whole.

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

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

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

DELIVERING THE STRATEGY

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

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

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

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

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

1 – A sustainable, resilient and competitive City Centre

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

2 – A vibrant City Centre which offers attractions for all

- Keep retail at the heart of the city.
- Do more to ensure that external perceptions recognise the true retail and cultural individuality and character of Exeter City Centre.
- Support the development of creative events and initiatives in the City Centre.
- Focus on creating opportunities and jobs – ensuring that, through investment in skills and training, local people (particularly young people and those wishing to return to work) have the opportunities to share in City centre success.
- Ensure that the City Centre continues to grow in strength as a ‘hub’ at the centre of the Heart of Devon tourism offer.
- Deliver something for everyone – ensuring that the retail and entertainment offer is attractive to all sections of the population.

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

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

4 – A better first impression

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

5 – A clean, well maintained and even safer environment

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

The Strategy is published at the time of the most significant squeeze on the public finances in decades. Neither core Strategy objectives or projects will be deliverable without a clear re-alignment of expenditure on City Centre enhancements, promotion & marketing, maintenance and competitive positioning between local authorities and the business community. Progress on delivering a Business Improvement District is likely to be an essential step in this realignment. It is worth flagging that there has been consistent, and substantial, funding for the City Centre from the public purse over recent years. In 2012 alone, the City Council spent in excess of £1.5m on improvements to Paris Street & Sidwell Street and improvements to King William Street car park. £660,000 has been identified from the public purse for Central station forecourt improvements. On an annual basis, the City Council spends £750,000 on CCTV, £2.8m on the Royal Albert Memorial Museum and £250,000 on tourism, city centre management, events and festivals.

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

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

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

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

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

It is also clear that the squeeze on public finances will remain for the period of the Strategy and beyond and that without the delivery of a Business Improvement District (BID) there will be significant difficulties in maintaining the positive momentum achieved in the City Centre over the last decade. Delivery of a BID is set out as the first key project within the Strategy Action Plan.

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

Areas highlighted within the Action Plan are prioritised as follows:

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

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

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

Action Plan

Projects only deliverable through a City Centre BID

Aim 1 – A sustainable, resilient and competitive City Centre			
Project	Year	Lead Partners – and cost estimate (where identified)	Objectives/Outcomes
Business Improvement District (BID)	Spring 2014 target for BID ballot	City Centre businesses Chamber of Commerce Exeter City Council Devon County Council BID feasibility study & campaign – minimum of £30k	To strengthen the City Centre's competitive position, improve marketing and promotional activity, increase day visitor numbers, increase awareness of the Exeter 'offer' and enhance City Centre safety, security and cleansing & maintenance.
Retailer inward investment targeting	Reviewable targets list First list 2015	Exeter City Council Private landlords Chamber of Commerce BID £8,000 p.a.	To further strengthen Exeter's competitive position by strengthening the representation of significant retail names in the city.
Improved presentation of vacant retail units On-going development of initiatives for use of vacant retail units	On-going	Exeter City Council Private landlords BID £10,000 p.a.	To enhance the visitor experience. To create a better trading environment for all businesses.
Aim 2 – A vibrant City Centre that offers attractions for all			
Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Renovation and regular Summer use of Northernhay bandstand	2015	Exeter City Council BID Lottery funding Corporate business sponsors £50,000	To deliver increased enjoyment in (& use of) Northernhay Gardens – reducing incidents of anti-social behaviour and encouraging wider use of a key City Centre park.

Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
City Centre WiFi and 4G	2015	City Centre businesses BID Exeter City Council Private sector providers City Centre landlords	Delivering a more business and customer-friendly City Centre.
Aim 3 – A welcoming and safe evening and night-time environment			
Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Purple Flag Award or appropriate alternative quality scheme	2015	Devon & Cornwall Police Exeter City Council University of Exeter BID Community Safety Partnership	Achieving Purple Flag status – the measure of the safest and most welcoming UK towns and cities at night – would deliver a range of benefits for the City Centre. Benefits would include: <ul style="list-style-type: none"> • A raised profile and an improved public image for the City Centre; • Increased visitor numbers; • Increased expenditure; • Further reductions in levels of crime and anti-social behaviour; • The delivery of a more successful mixed-use economy.
Aim 4 – A better first impression			
Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
City Champions/Ambassadors	2015	Exeter City Council Chamber of Commerce Exeter & Heart of Devon Hoteliers and Restaurants Association City Centre businesses	To ensure that ‘city gatekeepers’/first points of contact have a good knowledge of Exeter City Centre (facilities, attractions and history). This will be achieved through provision of targeted training and information to taxi drivers, hoteliers, bus drivers and other frontline staff. This will lead to improved perceptions of Exeter as

Project	Year	BID Lead Partners – and cost estimate (where identified)	Outcomes
			friendly & safe, leading to increased return visits & trade.
Improvement to Cathedral & Quay Car Park/City Centre links through South Street, Coombe Street and to the Quayside	2017	Exeter City Council Devon County Council BID	To enhance the visitor experience and significantly improve first impressions of the City Centre.
City Centre 'Hidden Pockets' (for example Coombe Street, Parliament Street & The Mint)	2017	Exeter City Council Devon County Council BID	To deliver targeted improvements and signage to the 'interesting' hidden City Centre public spaces, leading to enhanced perceptions of the individuality and diversity of Exeter and enhancing the attractiveness of – and visitors enjoyment of – the City Centre.
Aim 5 – A clean, well maintained and safe environment			
Project	Year	Lead Partners	Outcomes
Child Safe Zone – expanding scheme beyond the Guildhall Shopping Centre/Princesshay	2015	City Centre businesses Exeter City Council Devon & Cornwall Police	To deliver a more family-friendly shopping environment, further strengthening competitive position over other regional shopping locations.

Key projects for City Centre Strengthening and Growth

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

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

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

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

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

Essential day-to-day operational issues

Aim 1 – A sustainable, resilient and competitive City Centre			
Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Customer-convenient trading hours	Annual Progress Report	City Centre businesses Public transport operators Exeter & Heart of Devon Hoteliers & Restaurants Association Exeter City Council	To improve the link between the day-time and evening economies and to broaden the character of the latter by strengthening the café culture and extending opening hours. To deliver an improved ambience and reduce the incidence of alcohol-related anti-social behaviour.
Review of street markets – identification of opportunities for significant development	Options report – Summer 2014	Exeter City Council	Identification of opportunities for growth and enhancement of City Centre markets, with a view to enhancing City Centre shopping opportunities and dwell time.
Year-round Markets	On-going	Exeter City Council	To deliver increased City Centre retail options with a year-round series of specialist markets – building on the delivery of the 2012 Cathedral Christmas Market.
Regular PI monitoring and reports	Annual Progress Report	City Centre Manager Exeter City Council City Centre businesses	To ensure the decision-making process is well informed, with reliable and up to date information on City Centre performance
Aim 2 – A vibrant City Centre that offers attractions for all			
Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Review of street trading/street trading regulation across the City Centre. Deliver a City centre focus on street food.	2014	Exeter City Council Devon County Council Exeter Chamber of Commerce City Centre businesses	To recognise the potential of appropriate street trading to enhance the vibrancy of the City Centre; to use designated street trading and ‘street food’ areas as a mechanism for drawing footfall in to ‘secondary’ retailing areas such as Castle Street and the Cultural Quarter & Fore Street and the West Quarter.

Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Continued development of Exeter Trails – for independent cafes, food, arts & crafts, vintage & boutique and sports & leisure	Annual plan	Exeter businesses Exeter City Council Opportunities to link to development of Exeter App £10,000 City Council funding to first series of maps	To deliver a better and more varied visitor experience. To support a key component of the City Centre ‘offer’.
Christmas Market	Annual (first year – 2012)	Exeter Cathedral Exeter City Council Exeter Chamber of Commerce Exeter & Heart of Devon Hoteliers & Restaurants Association	To strengthen the attractiveness of Exeter as a visitor destination during the Christmas shopping period, with an annual Christmas Market. Year-on-year growth to be delivered.
Betting Shops – Review of Policy/Provision	2014	Exeter City Council	To consider what role betting shops play in the City Centre, ensuring that over-provision does not detract from the core City Centre retailing area.

Aim 3 – A welcoming and safe evening environment

Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Support the activities and initiatives of the Exeter Alcohol, Violence & Night time Economy Group	On-going	City Centre businesses Community Safety Partnership Exeter City Council Devon & Cornwall Police Public transport operators	To deliver improvements to the Exeter evening and night-time economy, ensuring the City Centre is an attractive and safe place in the evening for the broadest possible cross-section of the community.
To review the practicalities of a scheme identifying ‘problem’ premises – with the potential rolling publication of the top 5 problem premises.	On-going	Devon & Cornwall Police Exeter City Council City Centre licensees	To secure the safest possible evening economy environment, ensuring a positive reputation for the City Centre as a visitor destination during the evening and night-time period.
Taxi Rank Provision	On-going	Devon County Council Devon & Cornwall Police	Rank location, size and management have a major proven impact on safe and efficient dispersal of late-

		Exeter City Council	night economy users.
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Aim 4 – A better first impression			
Project	Year	Lead Partners – and cost estimate (where identified)	Outcomes
Street Scene – ‘Scores on the Floors’ Scheme and other partnership working	2014/2015	Exeter City Council City Centre businesses Chamber of Commerce	Building on the success of the Food Hygiene Rating Scheme, to encourage businesses to take more care with their own external housekeeping – refuse provision, customer litter, flyposting and graffiti. A scheme that rates and recognises tidy premises should help deliver a cleaner, brighter City Centre and a more attractive and successful trading location.
Taxi Forum	2013 and on-going	Exeter City Council Taxi operators Devon County Council	Recognising that taxis are a critical part of the smooth operation of the City Centre, a developing Taxi Forum will provide the opportunity to strengthen dialogue with the taxi trade and in turn to work with the taxi trade to: <ul style="list-style-type: none"> • 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.
Aggressive charity collectors Policy	2014	Exeter City Council Exeter Chamber of Commerce Charity Commission	To enhance the visitor experience by agreeing controls on aggressive charity collector activity in the City Centre, with a code of conduct to strike the right balance between charitable donations and the number of pitches, numbers of chuggers and number of days on which ‘chuggers’ are permissible.

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

STRENGTHS	WEAKNESSES
<p>Exeter Economy Strength of Exeter professional and business services and business quarters & East Devon Growth Point progress, including the development of Cranbrook</p> <p>Location Strategic location within South West Region Proximity to the Coast (particularly the Jurassic Coast World Heritage Site), Exmoor, Dartmoor</p> <p>Access Access to, and within, the City Centre is generally good – <i>although see also Weaknesses and Threats</i> Good – and improving – rail links Range of key rail services running to heart of City Centre, with excellent access to CBD from Central Station Comprehensive bus coverage, with extensive operating hours; usage increasing, contrary to the national trend Good, & improving, park & ride provision</p> <p>Retail Mix Mix of major retailers and independents</p> <p>'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</p> <p>Safety City Centre generally considered to be 'safe and secure' Excellent network of CCTV</p> <p>Eating/Drinking Great – and improving – mix of good quality cafes and restaurants</p> <p>Public Art</p> <p>Car Parking Quality of Car Parking stock and amount of user-friendly 'pay on foot' parking</p> <p>Pedestrian Signage</p> <p>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</p> <p>Education Top 10 University – major driver for City Centre economy</p>	<p>Access <i>Perception</i> of City centre as challenging to access <i>Perception</i> of Exeter as remote from key national population centres Congestion on radial routes, particularly at peak times Lack of park & ride provision to serve western and northern city catchments</p> <p>'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</p> <p>Business Engagement Lack of a City Centre BID</p> <p>Eating/Drinking Remaining focus on evening economy businesses with a sole focus on drinking in specific areas of the City Centre</p> <p>Pedestrian Signage – questionable as to whether signage drives footfall to 'secondary' retailing areas</p> <p>Facilities Poor provision for teenagers - & arguably for families with young children</p> <p>Opening Hours Poor offer</p> <p>Retail Mix <i>Perception</i> of 'Clone City'</p> <p>Web Weakness of information on City Centre shopping provision</p> <p>Public Art – some needs 'refreshing'</p>

OPPORTUNITIES	THREATS
<p>BID Support for a City Centre BID will unlock substantial additional income streams for the promotion, marketing and enhancement of the City Centre.</p> <p>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</p> <p>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’</p> <p>Retail Mix Could be significantly enhanced John Lewis effect Opportunities arising from the development of new, specialist, markets</p> <p>Opening Hours Significant opportunity for extending opening hours Connecting day and night time economies</p> <p>‘Public Spaces’ Opportunity to make more of public spaces – specifically Cathedral Green & City Centre parks Opportunities from further driving ‘pedestrianisation’ agenda forward</p> <p>Townscape Opportunities to drive more obvious pedestrian ‘circuits’ to offset disadvantages of ‘linear’ City Centre ‘Interpretation’ of historic core/City Walls Development of iconic new buildings Opportunities to make more of ‘The (Fore Street) Hill’ as a key independent shopping destination</p> <p>More celebration of what’s great about Exeter!</p> <p>Information & Communication Opportunities to turn more businesses/business people/city workers in to City Centre ‘ambassadors’/‘information experts’</p> <p>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</p> <p>Eating & Drinking Opportunity to grow reputation of Exeter as a centre for gastronomy</p> <p>Facilities Growing the ‘Castle Quarter’ offer – strengthening interface between RAMM, Phoenix, Library & Castle Improving City Centre hotel offer</p>	<p>‘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</p> <p>Safety Risk to CCTV effectiveness from staff availability for monitoring Continuing reductions in Police numbers</p> <p>Opening Hours Failure to connect day and night time economies likely to result in inability to change ‘dynamic’ of City centre at night</p> <p>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 <i>Perception</i> of City centre as challenging to access <i>Perception</i> of Exeter as remote from key national population centres</p> <p>Image Exeter perceived as old-fashioned, traditional & sleepy</p> <p>Multi Purpose City Centre Venue – Corn Exchange current capacity limiting its potential</p> <p>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</p> <p>BID Failure of City Centre businesses to support</p>