

Building Exeter Back Better



Dec 2020

Together we can Build Back Better



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Introduction

Exeter City Council is here to help the residents of Exeter, and during this time of crisis we have been working hard in the communities to support the vulnerable and shielded groups as well as businesses, through the distribution of grants. But Exeter City Council has not been immune to the impact of Covid-19 and we have been hit hard financially.

However, it has been pleasing to see how communities and organisations in and around Exeter have played their part during lockdown. The spirit of this city has not been broken and we continue to do what we do best; collaborate.

Our next big issue not only how we ensure Exeter is at the forefront of the UK's recovery, but how we also seek to facilitate a green-recovery which builds on our commitment to delivering a carbon neutral city. Exeter has always been a successful city, we've worked hard to keep it that way and now we have to work even harder to ensure we remain successful in to the future and Build Back Better.

A successful recovery is very important because we want to ensure that our residents and businesses can continue to work and enjoy the great things that living in Exeter brings. The work undertaken by the recovery work groups, supported by the Liveable Exeter Place Board, will ensure that we're in a good position to promote the work of the city and make others aware of what we can deliver to support recovery. I am confident that by working together we can pull through this and be a leading city in supporting the global recovery from the impacts of Covid-19.





Executive Summary

Understanding how the world will look from now onwards is the conundrum at the forefront of many business and government leaders' minds. At a time of perpetual uncertainty, determining what might be next by remembering what we used to do is to miss an opportunity to reimagine and improve our futures. Rather than interpreting the world as it was, we need to understand and respond to the world as it is. And, as the past few months have proved, challenging circumstances can stimulate prodigious amounts of innovation. We've seen teams, such as Exeter City Council's Well Being Exeter, the Exeter Chiefs Community Foundation and Exeter CITY Community Trust, execute change at speed and rise to challenges with incredible creativity, often demonstrating commendable qualities.

Life as it was before 2020 has changed. And, what happens next requires a fundamental shift in the evolution of our cultural narrative. We have left behind a society in which we 'knew all' to a new era of becoming a group of people who are 'learning'. Using this growth mind-set, business leaders, community builders and all those interwoven into society's fabric have a significant role to play to drive forth a vision that seeks to do more than return to what was before.

The scale and breadth of disruption caused by Covid-19 has affected all aspects of life in all communities, and its rapid onset will make the post-crisis turnaround and recovery uniquely demanding. The national response to recovery will not be designed and determined with specific places in mind. The reality is that consequences and impacts of the pandemic and its aftermath will play out very differently across regions, cities and communities.

The character of Exeter's economy is different from the rest of the South-West region. This recovery plan is rooted in the locality and is the result of the efforts of key public sector agencies and business and community stakeholders capable of providing a supportive, joined-up framework for the city. A coordinated effort, informed by local knowledge, will be key to minimising economic damage and shaping the recovery. It is a testament to Exeter's spirit of collaboration that so many organisations have come together to work on this plan. Together we can Build Back Better!

Other recovery plans, including regional and strategic recovery arrangements are being put in place by and overseen by the Devon Cornwall and Isles of Scilly Local Resilience Forum. Devon County Council and the Heart of the South West Local Enterprise Partnership also have recovery plans. Exeter City Council will continue to work with these organisations at a strategic level but this plan focuses on a place-based 'Exeter' response as we oversee the transition from crisis management to turnaround and recovery planning. It aligns with and compliments the work being done at county and regional level.

With the above in mind, The City of Exeter's recovery plan sets out seven key areas that have been most keenly affected by the pandemic. The plan briefly summarises what has already been done in response to Covid-19, but principally looks to take forward emerging opportunities, both long and short term, to support the city's recovery as well as supporting regional recovery.

The chapters of this report will set out proposed actions for recovery across the seven sectors, but an important component has also been to 'join-up' the work between groups to ensure that the actions and asks are optimised to realise maximum benefit to the city. This work has therefore allowed the Liveable Exeter Place Board to identify and propose three priority 'Asks', on behalf of the city which, with support from partners, can be delivered in the short term.

These asks are not necessarily the largest of all of the asks set out within this document, but they are specific place-based interventions which the Liveable Exeter Place Board believe will deliver across multiple agendas, support the delivery of the Exeter 2040 Vision and which will yield significant benefit for the city and its residents - supporting recovery from Covid-19, but also delivering on the city's long term commitment to a net-zero carbon city by 2030.

The asks are:

- **A £80m package of investment to support Exeter city centre: with initial focus on investment in the City Point (East Gate) project (£23m) as a catalyst for regeneration.**
- **A £15m investment in the development and implementation of bespoke digital training and skills package for Exeter.**
- **A five year funding package (of at least £1m per annum) to support the continuation of community activities by Wellbeing Exeter.**

1. Investment in the City Centre:

Funded together, these three interventions will have a transformative effect upon our city - not only securing our recovery from Covid-19, but also equipping the city for its future. More detail is provided on each ask on pages 6 - 11.

Investment in the City Centre is key to ensuring that Exeter remains a desirable and interesting place to Live, Work, Study & Visit.

Key interventions will build on projects currently underway, such as St. Sidwell's Point and the Harlequins development. Proposals for the revitalisation of South Street and the development of a fit-for-purpose, multi-use venue for the city will be progressed alongside investment in public realm. To support active travel there will be improved pedestrian prioritisation such as via the extension of some of the short-term 'pop-up' travel measures that were implemented during the early phase of the Covid-19 pandemic.

The City Point (East Gate) project offers the opportunity for the city to showcase its ambition and capacity to deliver sustainable and inclusive growth by providing a flagship mixed-use development in the heart of the city which delivers across multiple agendas; making City Point a showcase for future development in the city.

Joined-up partner support and investment of £23m in this major regeneration scheme in the heart of the city centre will:

- Unlock private sector investment, complement and complete ECC's delivery of St Sidwell's Point Leisure centre.
- Support the vitality of the High Street by delivering new homes and jobs on a prominent gateway site within the heart of the city.
- Facilitate the delivery of a new mobility hub to serve the city centre, supporting active and sustainable travel.
- Facilitate the delivery of new public realm and enhanced pedestrianisation.
- Deliver a new co-working location for the city, potentially aligned to a new Innovation Zone anchored around a significant public sector presence.
- Stimulate the construction and development sector.
- Deliver environmentally, exemplary development - showcasing what Exeter and the UK is capable of in delivering low carbon development and innovation.



2. £15m investment in a digital training and skills package for Exeter:

The Covid-19 pandemic highlighted the disparity that exists in our city around digital resources and skills.

This is not unique to Exeter, but tackling the effects of Covid-19 and preparing the city for the future means that it is an issue which should be prioritised to support everyone who has a part to play in the ongoing success of the city; our children, residents, businesses and workforce.

The need to ensure that everyone is equipped with the required digital skills for life and work is critical. The 5 digital skills that are needed for 'life' are identified in the Government digital skills framework, and the Exeter Skills Strategy identifies the Digital and Tech sector as a particular strength and opportunity for the city. A city-wide focus and approach to developing digital skills that provides clarity and pathways for those needed for work, business, education and digital/future careers is proposed. The Exeter Skills Advisory Group, supporting the Skills Strategy will lead on this.

In addition, the development of technical skills – with a particular focus on construction and associated sectors – will support Exeter's net-zero 2030 ambition, building on the successful delivery of Passivhaus and healthy buildings in the city, and support retro-fit requirements. The delivery of a flagship training academy drives innovation and would be transformative for the city – driving clean, inclusive and sustainable growth for the city, region and country as a whole.



3. A five year funding package for Wellbeing Exeter:

Wellbeing Exeter has been instrumental in coordinating and facilitating the city's response to the Covid-19 pandemic.

It has worked with key partners to support our communities through some of the most challenging times the city has seen in recent years. It has demonstrated the value of this Exeter initiative and its capability to effect positive change.

Commitment to long term funding of £1m per annum will support the continued operation of Wellbeing Exeter and in doing so secure the ongoing work of Community Builders, the asset based community development approach and continued social prescribing across the city. Therefore enabling long term sustainability of active lifestyles in Exeter.

Further funding, of up to £2m per annum, would allow the programme to go even further, upscaling the focus in priority areas, for those communities most disadvantaged by the effects of Covid-19 and experiencing greater inequalities as a result of the challenges they face.



Exeter: The Brilliant Alternative

EXETER
LIVE BETTER

Firm Foundations for Recovery

Exeter's strong place-making record and ambitious plans and programmes mean that there is already a lot in place to support the city and its communities. The scale and range of initiatives started before 'lockdown' should provide a backdrop of confidence for all those watching how Exeter recovers. Importantly, they offer existing and new investors positive prospects for a successful future. Examples of some of Exeter's firm foundations include:

- A strong track record of productivity and growth
(Fastest Growing City, Centre for Cities 2017)
- An outstanding educational sector
(University of Exeter 98% of research rated as world leading, THES, 2018)
- Strong strategic and multi-sector collaboration
(Liveable Exeter Place Board)
- A Garden City designation with a target to deliver 12,000 homes through a transformational housing programme (Liveable Exeter)
- Publication of the Net Zero Plan;
a roadmap to a carbon neutral city by 2030 (Exeter City Futures)
- UNESCO City of Literature designation and a Cultural Strategy developed with Exeter Culture
- One of twelve Sport England Local Delivery Pilots



"By the time they are an adult, a child born in Exeter today will live in a city that is inclusive, healthy and sustainable - a city where the opportunities and benefits of prosperity are shared and all citizens are able to participate fully in the city's economic, social, cultural and civic life."

Exeter City Council, Vision 2040.



Exeter's Vision 2040

In December 2019, organisations from within the City of Exeter and those with a keen interest in the continued growth and success of the city as an economic engine of the Greater Exeter regions, came together to form the Liveable Exeter Place Board. Here they agreed a commitment to Exeter's Vision 2040, to be recognised as a leading sustainable city and global leader in addressing the social, economic and environmental challenges of climate change and urbanisation.

Exeter's Vision for 2040 includes:

Innovative and Analytical City: As model of strong local democracy Exeter's innovative and analytical culture will support communities, businesses, civil society and public bodies to work together to solve the city's challenges and achieve its ambitions. The city's institutions work collaboratively with a coherence in pursuit of the city's vision.

Healthy and Inclusive: Exeter will be healthy and happy and local services will support people to live their lives well, in the ways that matter to them.

The most Active City in the UK: Exeter will be the most active and accessible city in the UK. With a high-quality built environment and green spaces, arts and cultural facilities, the city will serve to encourage healthy, active lifestyles.

Accessible World Class Education: All residents will have access to world-class education and training, as well as meaningful, high-quality employment with fair wages. The life-changing benefits of access to and participation in arts, culture and physical activity will be realised. Employers will be able to recruit, nurture and retain a skilled local workforce as well as attracting the best global talent.

Liveable and Connected: Exeter will be a thriving city, within a network of thriving rural and coastal towns and villages. Urban planning will protect and enhance Exeter's exceptional natural and historic environment, safeguard its iconic landscape setting, and encourage high-quality design that complements and enhances the city's heritage.

A Leading Sustainable City: Exeter will be a carbon neutral city by 2030 and recognised as a leading sustainable city and a global leader in addressing the social, economic and environmental challenges of climate change and urbanisation. The Exeter of the future will have grasped the opportunities ahead of us today.

Culture: Under its UNESCO City of Literature status, Exeter will innovate and lead in the area of the environment, wellbeing, cultural literacy, creative making and heritage innovation to build a living city where everyone thrives.



Liveable Exeter

At the heart of Exeter's recovery is the Liveable Exeter programme; a transformational housing programme that aims to create 12,000 new homes in the city by 2040 with a vision for a prosperous, sustainable, community led and active city.

Exeter was granted Garden City designation in 2019, in response to the city's need for high-quality homes and services. Working in close collaboration with local architects and partners the programme will create new communities for the city guided by Garden City principles. These principles have been built into the core of Exeter's Vision for 2040 and now have particular relevance as we look to the future and recovery from Covid-19. They include:

- **The promotion of human wellbeing:** a range of employment opportunities and cultural services
- **A complete mix of housing,** including social and affordable housing
- **Walkable neighbourhoods, tree-lined streets and high quality design**
- Vibrant parks and opportunities for residents to grow or have access to healthy food, while also **promoting access to nature and opportunity for biodiversity**

For example, ECC together with Devon Wildlife Trust are developing plans for the enhancement of Exeter's Valley parks, ensuring that nature continues to thrive in our city. This will be supported by the delivery of improved active travel corridors, connecting people with nature through new and enhanced pedestrian and cycle pathways and signage.

Alongside this, work is underway to consider and plan for future employment within the city; ensuring that the right type and amount of employment space is planned for and accommodated in order to ensure that the city and its residents continue to prosper in to the future. Innovation will be key to the success of the Liveable Exeter programme, and identifying innovative solutions to support the continued growth and success of Exeter will be a key focus.

The Liveable Exeter team are working closely with public sector partners and private enterprise on 8 key projects within the city. These sites include, St David's station, Water Lane, East Gate and, in the longer term, Marsh Barton. These sites have the potential to unlock transformative growth for the city, creating sustainable urban communities, with new homes, schools, leisure, retail opportunity, and work space to create a thriving, connected city.

The programme represents nothing less than ambitious and long term renewal of the city's fabric to meet people's needs for homes, jobs and services in the 21st century.

The Liveable Exeter Place Board

To help support such an ambitious programme, the Liveable Exeter Place Board was established to bring together all the major organisations in the city as well as private and voluntary sector figures. It allows for frank and candid confrontation of the issues they face in a manner that supports collaboration and a common purpose. The issues involved within the recovery plan for the Exeter are broader than the city council and will benefit collaboration with city partners.

The Liveable Exeter programme represents nothing less than ambitious and long term renewal of the city's fabric to meet people's needs for homes, jobs and services in the 21st century.

Net Zero Plan

Another supporting piece of Exeter's recovery is the city's Net Zero Plan. Each of the seven recovery groups has considered and put forward actions that support this plan. In 2019, Exeter City Council declared a climate emergency and boldly set the ambitious target that Exeter should be a carbon neutral city by 2030.

Undeterred by Covid-19 and bolstered by the city's positive reception to the Net Zero Exeter 2030 Plan published in April this year, Exeter's determination to be carbon neutral by 2030 remains undiminished. In fact, as Exeter's Emergency Transport and Retail Roundtables held earlier this year established, Covid-19 has accelerated already anticipated needs for change in the role, operation and navigation of the city, well-suited to achieving a net zero ambition.

It is not surprising then, that in planning for Exeter's recovery from the pandemic, the city's net zero goals are firmly at the core of this strategy. Success means a healthier, greener, more vibrant city where people breathe cleaner air and live a more active life now and into the future.

Putting net zero at the heart of the city's recovery is not a whim. Exeter has been playing a leading role in addressing the critical climate change challenge for some time. Through the University of Exeter and the Met Office, the city has a world-class reputation in climate and environmental research. Between them, they continue to share insight and defy conventional boundaries of science and knowledge, working with those locally and globally to deliver extraordinary impact and benefit.

Officially adopting the Net Zero Exeter 2030 Plan for the city in July this year, Exeter City Council has pioneered the development of energy efficient Passivhaus homes in the UK over the past decade through its own development company, Exeter City Living. Exeter City Council's own commitment also includes transforming council operations - its aim is to be carbon neutral by 2022. Steps have already been taken to consider staff travel and working patterns. Much of the City Council's fleet of vehicles have been replaced by electric vehicles: the switch to electric pool cars for staff travel on official duty has provided a 75% reduction in CO₂ emissions compared to 2010 figures. Replacement of the Council's ageing diesel-powered vans has also cut carbon emissions of its entire transport fleet by 35%.

There is still much to do, but Exeter is stepping up as a leading city, embracing its net zero ambitions, and working collaboratively to trail-blaze innovative solutions that ensures Exeter remains one of the greatest places to live, work, study and visit in the UK.



The Impact of Covid-19 on the City of Exeter

A report by the Royal Society for the Encouragement of Arts, Manufactures and Commerce (RSA) looking at the total proportion of jobs at risk from the impact of Covid-19, by local authority areas, concluded that six out of the 20 hardest hit areas in England and Wales (out of 370 local authorities in total) are in Devon and Cornwall. Exeter by contrast appears in the top 20 local authority areas least at risk. This reflects the fact that Exeter has a larger than average proportion of workplace based employment in:

- Information and Communication
- Human Health and Social Work
- Education and Professional
- Scientific and Technical Activities

All of these are sectors with the lowest proportions of staff on furlough leave. As the city of Exeter is home to the Royal Devon and Exeter hospital, two local authority offices, the University of Exeter and Exeter College and other public services, therefore it likely to fare better, in the short term at least, than other areas of the region with very low levels of public sector employment.

However, faced with the prospect of the worst recession in 100 years and the potential loss of over 120,000 jobs in Devon, maintaining the city's recent economic performance cannot be assumed. On the contrary there are significant challenges facing the city and the recovery programme has been designed to prioritise these areas. Exeter has a role to perform on behalf of the region. The city is a key driver of the wider economy and has the opportunity to realise the ambition for the region to improve productivity and deliver great economic outputs.

Furthermore, Exeter can use the opportunity afforded by Covid-19 to facilitate a green-recovery and to deliver on many of the proposals that have been forming in the city in recent months and years; the city is known for its innovation and creativity, and we are now presented with an opportunity to showcase what the city has to offer the world and to show how clean, sustainable and inclusive growth can be delivered - to the benefit of all.

Exeter City Council's finances will limit the work that can be done by the City Council alone in support of the recovery programme. During the previous recession, ECC was able to fund interventions in the public realm and invest in events and city centre activities. The income loss that we have experienced as a direct result of Covid-19 will be a severe challenge but there is potential through Exeter City Living and the Liveable Exeter programme to make direct interventions that support the housing market – working with partners who share our ambitions and vision.

Covid-19 has emphasised some key issues such as rural isolation, low wages, and inequalities between and within areas, relative poverty and that housing affordability, particularly in rural and coastal areas, is likely to worsen. Our natural environment and the economic strength of Exeter are key economic assets we can build on. Our landscape is a huge attractor to residents and visitors and can capture carbon emissions and we have the UK's best solar energy resource. Exeter is likely to bounce back more quickly from Covid-19 as an economy and can stimulate and support recovery across the Greater Exeter footprint.





Key Recovery Areas

Summary from Richard Marsh.

Exeter is a city where genuine city-level collaboration takes place to effect positive change for the city. The commitment to ‘makes things happen’ is demonstrated through the coming together of the Liveable Exeter Place Board who have coalesced around a shared vision for the city.

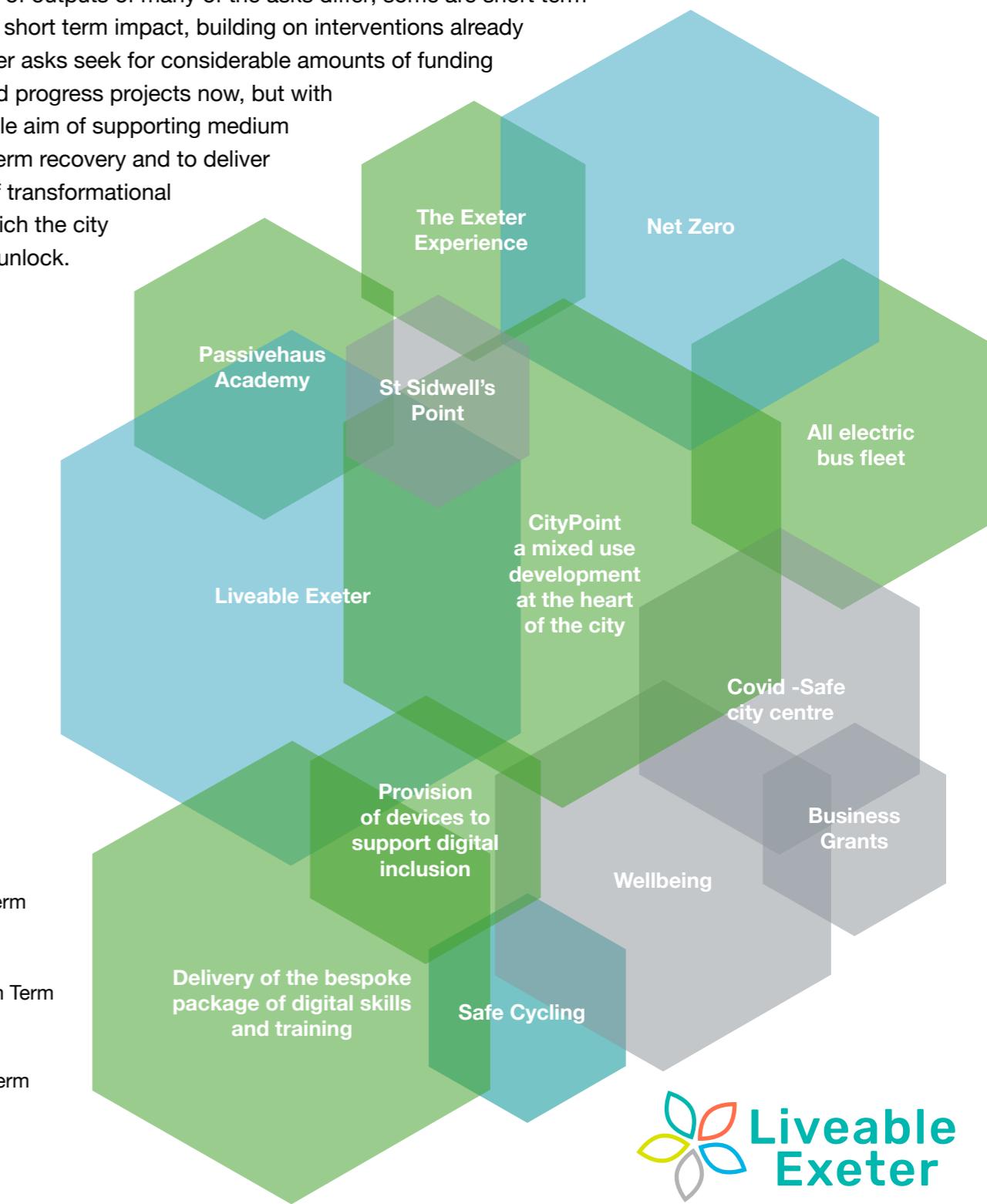
The formation of the seven recovery groups, chaired by members of the Liveable Exeter Place Board, has therefore offered the opportunity for many leading organisations to support the recovery plan for the city. In doing so the members have drawn out detailed, city-level knowledge and understanding of opportunities and challenges unique to Exeter. Tying this into the wealth of detailed knowledge and understanding about their specific areas of focus has resulted in a bespoke plan to drive growth back into Exeter and the surrounding region - but to also deliver growth which is sustainable and inclusive.

Exeter’s Principles of Recovery

The plan is underpinned by the following principles. We will:

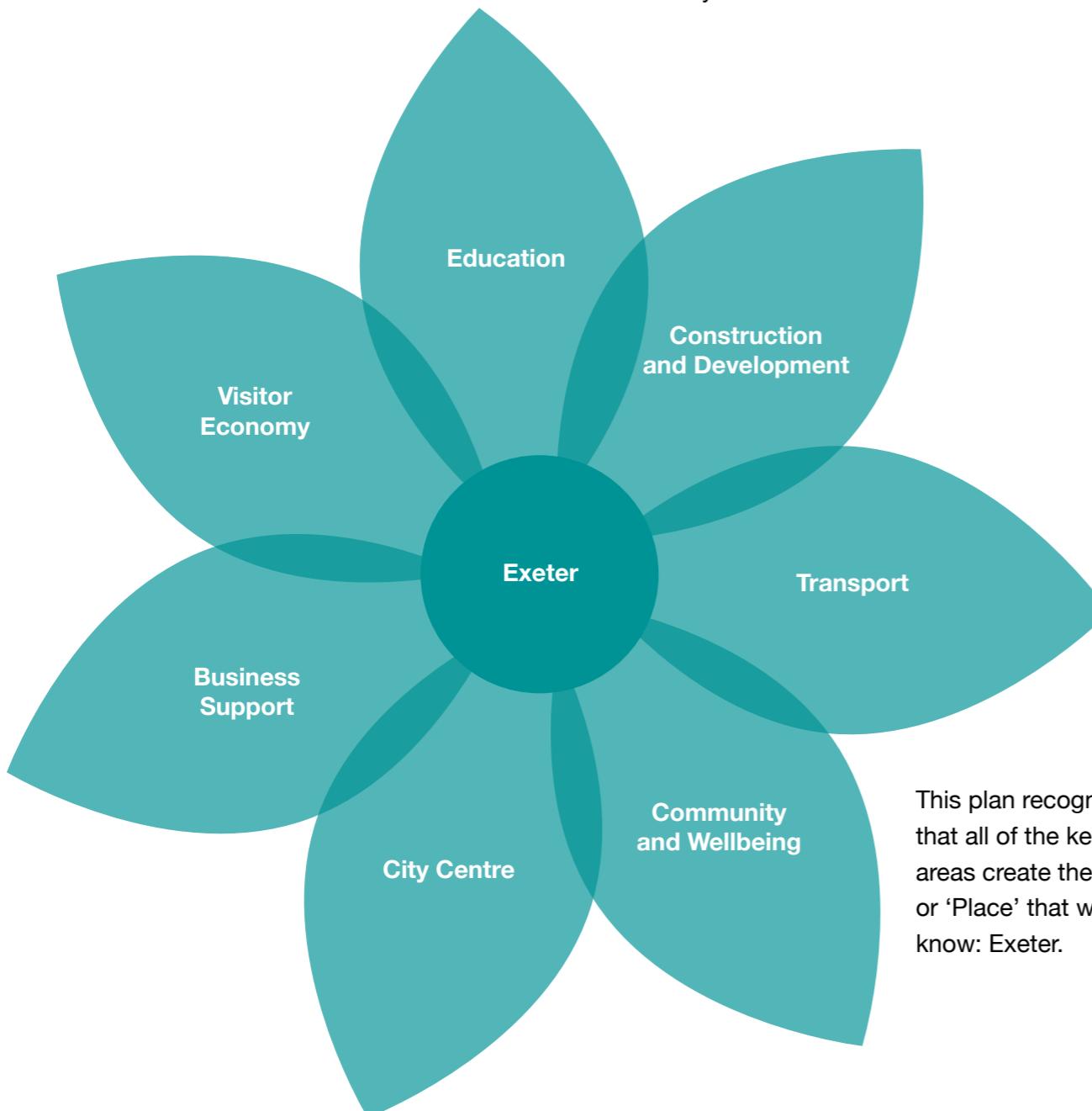
- Work on the basis of a ‘**Build Back Better**’ strategy, avoiding sub-optimal quick fixes or ‘replacement recovery’ that recreate the pre-Covid-19 status quo
- Aim for innovation and transformation, seeking progress on key priorities for the city, for instance: the climate emergency, clean inclusive growth, health and wellbeing, community cohesion, inequalities and cultural growth
- Plan with robust evidence of damage and needs assessment, setting ‘Build Back Better’ development or transformational goals and outcomes
- Increase resilience for future pandemics (and other societal crises)
- Collaborate with regional and sub-regional arrangements and our neighbours and showcase success in innovating and collaborating for shared outcomes
- Work with our communities to understand local issues and ensure co-delivery of this plan.

Each chapter of the recovery plan therefore sets out well-thought out and informed ‘Actions and Asks’ in its own right and, it is hoped, that partners and stakeholders will recognise the value and impact of these proposals and support the city in realising these interventions to support recovery. The nature and timing of outputs of many of the asks differ; some are short term with direct short term impact, building on interventions already made, other asks seek for considerable amounts of funding to start and progress projects now, but with the principle aim of supporting medium and long term recovery and to deliver the type of transformational growth which the city is keen to unlock.



However, the plan also recognises that a city does not work in silos and that all of the areas of focus overlap and converge to create the city or ‘Place’ that we know; Exeter (See diagram). Cities are complex and dynamic and Exeter is no different in this regard; understanding how the Place functions and the overlap between work streams is therefore essential to identify the opportunities and challenges that face us and to plan to respond to them successfully.

To this end the recovery groups have worked collaboratively to explore the overlap between workstreams, and to ensure that the proposed ‘Actions and Asks’ for each workstream respond to and complement the others. This joined up approach will support the continued development of Exeter as a Place and realise the shared vision for the future city.



Adopting a place-based response which considers the overlap between themes has also allowed us to synergise the proposed response (‘Actions’) to the pandemic and to optimise the ‘Asks’ to ensure that we prioritise actions which can best facilitate recovery and deliver on the vision for the future city. We know that resources to respond to the pandemic will be finite and that the city will have to compete for these; we have therefore set out ‘Asks’ which we think will deliver maximum impact for the city and which respond to the broadest range of issues facing the city.

Bringing together the work of the various groups has also allowed the identification of key city-level interventions, set out on pages 6-11, which would maximise the return on investment for the city; deliver outputs across multiple areas of focus; facilitate continued collaboration between partners’ and deliver on the shared vision for the future city. These are the ‘Asks’ which the City has chosen to prioritise above all others and which it hopes will be amongst the most compelling for government and other partners to support and which most respond to the impacts of Covid-19.

The following pages set out the work of the individual recovery groups. Each page is prefaced by a summary from the Chair of the group, before featuring a set of ‘Actions and Asks’ drawn from the work of the groups.

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Business Support

Introduction from Group Chair, Matt Roach.

The Business Support group has engaged with a wide range of partners and stakeholders from across Exeter and the wider region, including public, private and CVS organisations.

We have covered a broad range of topics and ideas that all contribute to the business support landscape in the city and beyond, ensuring that all of the opportunities for our business community have been captured, and identifying the gaps where we need to develop and build support.

There have been some areas that the group and members have focussed on initially – supporting businesses to re-open safely in line with Government guidance, getting finance in the form of grants to those who need it and ensuring that existing support and training programmes have been promoted to the business community.

Some existing groups, such as the Exeter Chamber of Commerce, have also picked up the challenge of developing their work to specifically support recovery work. The Exeter Skills Advisory Group that supports the city's Skills Strategy, have reviewed their work and identified what is needed most immediately to support skills development and employment opportunities in the city, working collaboratively with a number of key partners.

Other themes within this plan present exciting opportunities for the city, and a number of our actions and asks will underpin and support these - our work on relocations is aligned to the Construction and Development and City Centre Groups.

Our STEMM sector in particular presents some exciting opportunities to lead the way in Building Back Better. With the investment in the Future Skills Centre at Exeter Airport, we have an anchor point for a range of support services, including job matching, work experience, apprenticeships and recruitment, that will enable this sector to grow and flourish in the region.

Continuing to support Exeter's businesses through the next few months, which we expect to be challenging and difficult for many, will be crucial. We need to provide services that will enable businesses to make well informed decisions, protect jobs, and support the local economy.

We know that Exeter has a vibrant business community and by working in partnership we can continue to support them to grow and flourish.



Online startups increased in the city during lockdown



10,240 digital tech jobs in a sector is worth £271 million

ACTIONS	ASKS	OUTPUT
Skills and Training		
Development of the EXETER WORKS to support: ■ Individuals to access support, advice and guidance about employment, re-training and skills development ■ Businesses to access support to up-skill, re-train and develop their staff. Access guidance relating to workforce planning, re-organisation etc. To be delivered through two methods; an online resource that provides effective signposting to the most appropriate source of support and a 'pop up' presence in the city centre to provide face to face interactions, with a range of key stakeholders engaged; JobCentre Plus, National Careers Service, Devon and Cornwall Training Provider Network, Exeter Chamber, Exeter FSB.	£20k to develop a comprehensive online resource with co-ordinated communications campaign and support. (launched Autumn 2020 - ongoing). £100k to provide a short-term 'pop-up' presence in Exeter city centre - fit out, rent, staffing, communications campaign. (launch Autumn 2020). £40k to recruit a digital marketing apprentice for two years to support the delivery of this work.	By 31 March 2021: 250 individuals supported to access training and employment opportunities. 100 businesses supported to re-train staff/ develop workforce skills, redundancy support. 15 organisations actively involved in providing advice and guidance and / or signposting. A legacy of activity and a network to continue to support skills, training and employment in Exeter.
Collaborative working with Team Devon to ensure that Exeter has maximum benefit from Programmes /Projects they are delivering. Recognition of Exeter Skills Advisory Group as the delivery mechanism for Employment and Skills initiatives in Exeter.	£25k allocated from resources identified in Team Devon plan to support a co-ordinated approach in Exeter, delivery of associated work plan (Autumn 2020).	Co-ordinated response to Skills and Employment challenges and opportunities in line with the Exeter Skills Strategy.
Finance and Investment		
To provide pro-active support for the development of a South West Venture Capital / investment network to benefit Exeter businesses (led by partners).	Proactive, engaged and timely support from Place Board for this initiative (as required by those leading the initiative).	South West Venture Capital Fund established.
A tailored, local grant fund to support businesses to transition and change to new ways of working post Covid-19. Open to businesses that have not been able to access funding from any of the Government schemes - Small Business/Tourism and Retail/ Discretionary Grant Funds etc.	£3m to run a tailored, local grant scheme.	c. 300 businesses supported.
Relocations		
To develop the proposition for major relocations to Exeter (Government/Company HQs/Charities), linked to the City Point development and in-line with Exeter Live Better promotional activity.	£75k for development of proposition and targeted marketing campaign launching Spring 2021.	Two major relocations secured by 2022 to support a thriving hub for the centre of the city.
Commission a study (with some elements ongoing) to review demand for, and supply of, commercial space within the city and identify investment priorities - building on work already underway.	£50k for a study (commissioned by Spring 2021) to build on existing work around employment, land, building provision and identify interventions required to support continued city success.	Ability to target investment where most needed for commercial property in Exeter. Supports Construction and Development group activity.



Exeter is home to over 5600 businesses, with a workforce of 89k



ACTIONS	ASKS	OUTPUT
Support for SMEs / Self Employed		
<p>A comprehensive package of business support for businesses in the city to complement the existing programmes that are available (e.g. Growth Hub and BIPC). To include; access to start up grants (link to growth/opportunity sectors), access to devices to support workshops, connectivity, active travel grants and support, dedicated online support service and virtual offer. Ensure that the priorities of clean and inclusive growth and move to Net Zero are embedded in the business support offer.</p> <p>To specifically support businesses with recovery, adaptation, new product development and digitisation.</p>	<p>£500k to develop and commission a service (Procured Winter 2020, launched early 2021, delivery to end March 2023).</p>	<p>At least 1,000 businesses supported, 100 new business start-ups supported, 50 new jobs created.</p>
<p>Explore the potential for the development of an Innovation Zone for a specified part of central Exeter to stimulate business start-up.</p> <p>This would specifically support businesses that align to the city's aspirations for Clean and Inclusive Growth and Net Zero Carbon. A basket of incentives would be provided to businesses (such as business rate relief, enhanced business support).</p>	<p>£75k to commission a study to develop the concept with a view to developing a scheme for a pilot.</p>	<p>Explore the potential for the development of an Innovation Zone for a specified part of central Exeter (potentially focused on City Point) to stimulate business start-up.</p>
STEMM Sector		
<p>Development of a Skills & Jobs Matching Service to support the STEMM sector in Exeter and the east of Exeter to secure the skilled workforce they need now and in the future. Embedded within the Future Skills Centre, led by Exeter College, working collaboratively with the University of Exeter. This proposal also supports the ambitions of the SWIoT, EXIST and is closely aligned to promoting the region under the Exeter Live Better banner.</p> <p>"ExTex"</p>	<p>£75k to match fund the development of; portal, matching service, dedicated advisors and associated communications campaign over a two year period (launch January 2021).</p>	<p>Annual Targets:</p> <ul style="list-style-type: none"> 150 businesses engaged 60 work/student placements secured 25 Apprentices recruited 30 Jobs matched



Exeter has a highly qualified workforce with 39% of our population qualified at level 4 or above





City Centre

Introduction from Group Chair, John Laramy.

The mission of the Exeter City Centre Recovery Group is to:

- Safely re-open the city centre and our Neighbourhood Shopping Areas to support workers, shoppers, students, visitors and investment back into Exeter,
- Build Back Better, creating an attractive city that is safe and welcoming for visitors and residents, giving opportunities for a healthy, enriched lifestyle in a green environment.

The original purpose of the city centre Recovery Plan was to, in accordance with central government guidelines, provide leadership on safely re-opening the city centre, and neighbourhood shopping areas, implementing appropriate social distancing measures. City Centre recovery group members were invited to participate in discussions based on their significant presence in the city centre, or because they represent retail and professional businesses.

As a group we all want to make Exeter City Centre fit for purpose for 21st century life.

Exeter is the place for good quality living; outstanding educational opportunities; it has a vibrant social and cultural offer; secure employment; and is the place to open and grow your business - all ingredients for a successful city.

John Laramy
Principal
& Chief Executive
Exeter College

Once the City Centre reopened in July, the group focused on facilitating positive change and re-establishing a healthy level of footfall, which fell 85% to 67,351 due to lockdown restrictions imposed by Covid-19. This increased to 1077,181 in July, but compared to July 2019 that figure shows a 50% decrease in footfall.* Research commissioned by Devon County Council, predicts that Exeter will be one of the least affected areas in Devon, with neighbouring districts being the most affected. However it is important to remember that the city centre relies on people travelling into the city for work, shopping and cultural activity and we will need to work harder to attract people back into the city centre.

Planning for the city centre also considers whether there will be ‘new-normals’ post-Covid-19 and how we need to adapt to these changes. For example, local data shows that 52.7% of businesses operating in the city are considering a reduction of office space requirements as more companies choose to allow their workforce to continue to work from home.

This shift has an obvious impact on the city’s footfall with relation to office workers and with the closure of national retail and hospitality businesses. In Exeter 60% of businesses have been severely impacted by Covid-19, with reports of 50 businesses closing down since the start of lockdown, with more expected to follow once furlough ceases to exist. In addition to the further complexity of people changing their shopping and travel behaviours, the city’s ability to recover its pre-pandemic footfall levels looks challenging.

So, if people are not coming into Exeter to shop or work we cannot risk that Exeter becomes a shadow of its former self. For our residents, our businesses, our students and our visitors, we want the city to be a vibrant destination with a broad mix of places to live, work, socialise, visit, study, shop and work. To address this challenge, we have been working with the Business Support and Visitor Economy groups.

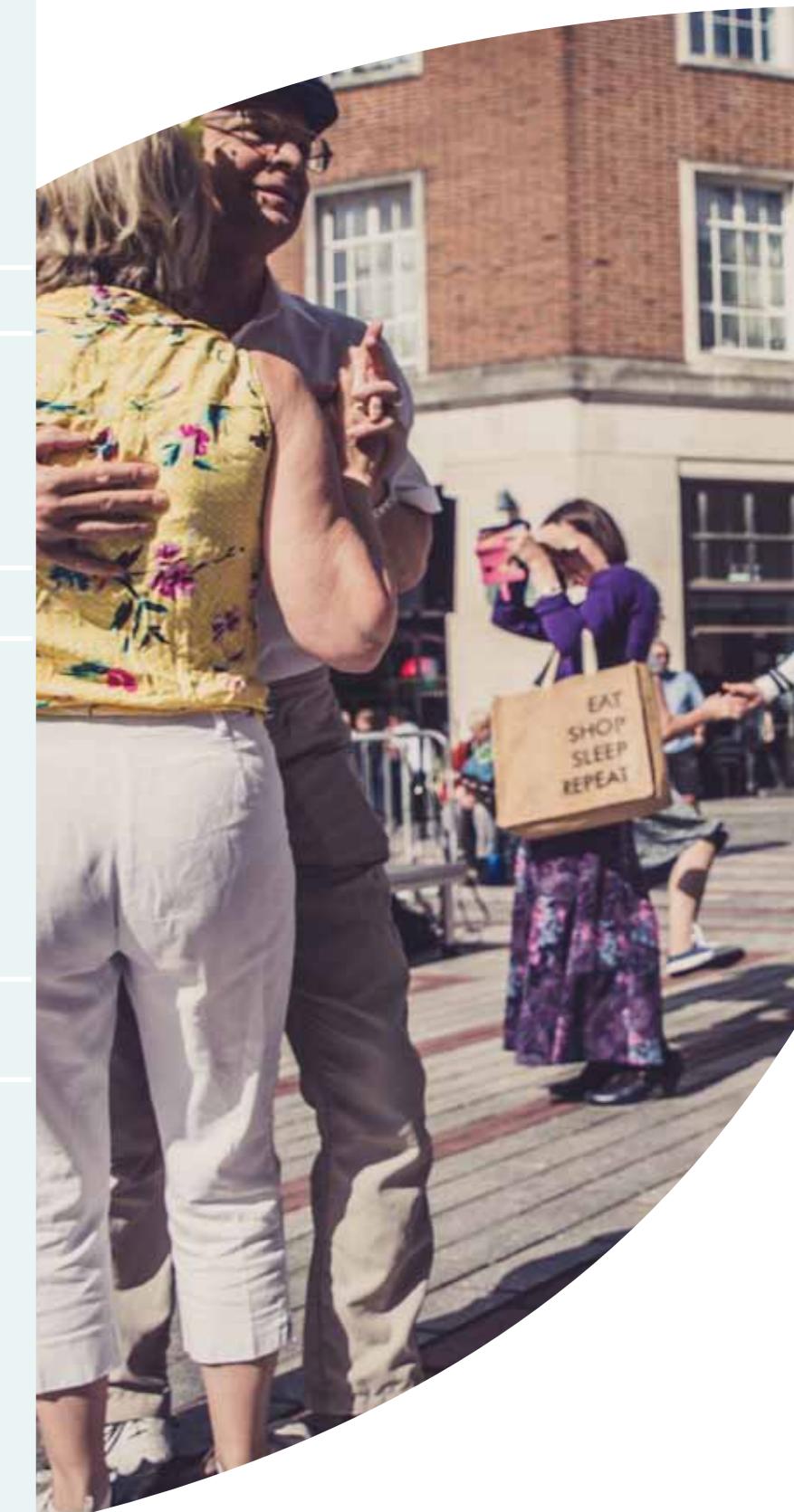
Some of the things we would like to do to encourage more people into Exeter includes making the city centre space more attractive to families; providing more things to do, making the best of what we produce locally and improving the air quality to increase dwell time. These actions put clean and sustainable growth at their core. Support from partners to make these things a possibility is essential to strengthen the city as it looks to build recovery. More detail is provided in the table overleaf.

*Data from InExeter, July 2020.



Footfall dropped by 85% due to restrictions imposed by Covid-19 lockdown.

ACTIONS	ASKS	OUTPUT
Make the City Centre an attractive place to visit:		
Ensure the city centre is an attractive place to visit for young people and families, ensuring facilities are adapted and developed with these in mind. The current view is that there are not enough facilities for families.	£22m Improved public realm. Green spaces adapted & enhanced. Existing & new attractions developed. Improved access from St Sidwell's Point to the city centre.	An increase in the number of families visiting the city, not just for shopping. Dwell time extended. Increase in spend across the city centre. New facilities opened for young people. Night time and coordinated refuse collections.
Promote City Centre projects:		
Develop and promote city centre projects which will support, diversify and intensify activity in the city centre and support our businesses.	Investment in, and partner support for, capital projects (including City Point as a flagship project) which will add further critical mass of development, bringing more people in to the city centre and supporting the long term viability of the high street.	Support for existing businesses. New, fit for purpose workspaces. New homes. Enhancement of the reputation of the city centre.
Carbon Reduction Fund:		
Establish a revolving fund to provide a source of finance for carbon reduction projects within existing publicly and privately owned buildings.	£200m Collaborative working between partners to establish a regional fund to support a wide scale programme of retro-fitting of commercial properties and facilitating the development and promotion of green-energy generation schemes. District heating network is linked to and services the city centre.	City Centre designated as a Carbon Net Zero space. Attraction of leading climate change companies to relocate to city centre. Increase in productivity / salaries. Increase in properties heated via district heating network.
Trial car-free areas and zones with enhanced pedestrian prioritisation:		
Trial car-free and pedestrian prioritized zones in the city centre.	£15m (permanent changes) Undertake a wide and full consultation with business, residents and visitors to Exeter on options for temporary and/or permanent pedestrianisation of one or more city centre streets. Reprioritise roads for other uses - bars, restaurants, markets and events.	Improvement in air quality. Increase in dwell time. Footfall increases to pre Covid-19 levels. Enhance the experience of the city centre. Decline in city centre near misses. Easy transition from daytime to nighttime economy. Increase the number of city centre events.



ACTIONS	ASKS	OUTPUT
Zero-waste zone:		
Designate the city centre as a 'zero-waste zone' that supports a wider city agenda to be carbon-neutral.	£4m City centre pilot in partnership with UKRI to test and implement practices and policies in the city centre becoming a zero waste zone.	Scheme launched within a designated area of the city centre. No waste to landfill/incinerator from the zone. Significant reduction in recycling, aim to be zero waste.
The Exeter Experience:		
Address the impact of online shopping and Covid-19 to ensure there is a mix of anchor stores and independent traders remaining open in the city centre. Ensure the shopping experience is experiential and not solely transactional. To support the city centre, implement a quality assurance scheme which promotes consumer confidence in safety on the high street, building on the Buy with Confidence approved trader scheme.	£20m Support new innovative ways of working within the retail and hospitality sector. Improved public realm. Enhanced events programme to attract shoppers.	Reduction in the core retail and hospitality zone. A buoyant and vibrant city centre. Increase in footfall. Bulk delivery service (zero carbon), covering city centre and its neighbourhoods. Extensive events programme to support UNESCO status.
Access to local produce:		
Provide access to locally produced sustainable food and drink to businesses and residents of Exeter, through a wide range of shops, markets, buying groups and online purchasing.	£4m Linking to work underway at a regional-level on a South West Food Hub. Development of a regional produce distribution hub. Space provided for a year round events and local food markets. Development of a zero carbon delivery service.	Increase in local food consumption. Programme of year round markets, to support local food / drink / craft. Increase in employment and productivity in food and drink production. Zero carbon delivery service, covering Exeter.
Meanwhile use programme and 'pop-up' events		
Ensure that spaces awaiting redevelopment, or which are currently underutilised, are used to support meanwhile activities and pop-up events – supporting local business and animating the city centre.	£2m Funding to support investment in supporting infrastructure and the delivery of a rolling-programme of events. Support from partner organisations in making spaces available.	Increase opportunities to support local suppliers and businesses, ensure that spaces are well used and occupied and facilitate opportunities for innovation and creativity. Year round programme of events and markets developed for the city centre.





Community and Wellbeing

Introduction from Group Chair, Dinah Cox OBE.

The Voluntary and Community Sector (VCS) is a key part of the city's fabric and it delivers an extraordinary value which is so much more than the services or the events that are run. Their value is also in the social benefits brought to communities through local connectivity, social organisation, leadership and ownership demonstrated through the fantastic things that people achieve in their communities.

Never has this been truer than in the months of the Covid-19 pandemic where thousands of people stepped up to offer practical help, support and friendship to neighbours. Mutual aid groups have sprung up throughout the city with people organising themselves to connect people and support each other through these challenging times.

This amazing community response is one of the ingredients that help make Exeter such a great place to live. Partners across the city have been able to find a way, in the face of on-going austerity from national government, to ensure that all areas of the city are supported through the assets based work of Wellbeing Exeter which was established as a small pilot over five years ago. It has grown into a remarkable and unique, place-based network of support for individuals through Community Connectors linked to every GP practice in the City; and for grass roots community activation through the Community Builders based in every ward.

The Wellbeing Exeter network reaches into every part of the city and has been a vital ingredient in the community response to Covid-19. Our challenges now are to continue to secure funding to sustain and expand this work and to address key issues identified through on-going learning and listening that is an essential component of our asset based community development (ABCD) approach.



Exeter is a great place to live and work and people overall do well, however there are stark inequalities within the city.

Tackling these entrenched issues is a focus of Wellbeing Exeter and the Sport England Local Delivery Pilot (LDP). There are already indicators that existing inequalities are being exacerbated by the pandemic which is why we need to act now to ensure they don't get any worse.

In our collective recovery work we will need to have a focus on the people and communities who already face the greatest challenges and work alongside them to find existing or adaptable innovative solutions that solve specific Covid-19 related challenges that are impacting on their lives. The challenges we need to focus on first are changes in financial circumstances due to Covid-19, mental health impacts and the risk of digital exclusion. We need to create mechanisms to hear from individuals and organisations that offer solutions specifically developed to support groups most likely to be affected by Covid-19. Much of this we can continue to do within our existing network and approach but there are some critical things that we need support from others to help us address.

The challenges we need to focus on first are changes in financial circumstances due to Covid-19, mental health impacts and the risk of digital exclusion.

ACTIONS	ASKS	OUTPUT
Secure funding for community building:		
Secure sustainable funding for Wellbeing Exeter to ensure the infrastructure necessary to facilitate and encourage on-going community activation. Support neighbours, families, friends and communities to come together to identify local assets and issues and working together to build better neighbourhoods.	£1m per year Partner commitment to sustainable funding for core Wellbeing Exeter functions and infrastructure.	A rolling five-year funding pipeline for Wellbeing Exeter to enable the Voluntary, Community & Social Enterprise (VCSE) sector involved to invest in the long term.
Revise Sport England Local Delivery Pilot:		
Deliver a revised LDP that captures the shifts in behaviour and needs created by the pandemic: working within target communities to promote positive behaviour change to increase physical activity in the new context.	£1m per year Partner commitment to the aims and objectives of the pilot programme.	Improve health and wellbeing; Narrowing stubborn inequalities; Understanding of place based approaches to positive behaviour change to tackle key city challenges: congestion and inactivity.
St Sidwell's Point:		
Regenerating Exeter City Centre through delivering the UK's first state of the art super energy efficient and Passivhaus Swimming Pool & Leisure Centre.	Partner commitment to delivering and mobilising the flagship centre of Exeter's leisure offer.	New leisure and swimming pool to improve health of wellbeing of residents in Exeter.
WellBeing Hub and Sports Village:		
Accelerate plans for Wonford Health & Wellbeing Hub and an Exeter Arena Sports Village for new leisure facilities aimed at families being active together whilst simultaneously increasing local job opportunities.	£20m across two sites Partner commitment to raising the capital funding for these developments.	New health and wellbeing centres created in the target communities enabling and supporting participation for all.
Digital Inclusion:		
Create a citywide programme of digital support to enable all residents to access online services and complete everyday online tasks.	£100k per year Partner commitment to establish an integrated citywide digital support platform for excluded residents.	Residents are able to access online services for practical everyday needs in a safe and confident way.
City Centre Safety Summit:		
Following the Board's Leadership Summit on antisocial behaviour, street attachment and rough sleeping senior leader across the city have agreed to collaborate to achieve a genuinely whole system approach to end rough sleeping and ensure everyone has a home.	Leading organisations across sectors jointly commission a programme of work to achieve a genuinely human and whole system approach which is aimed at everyone having a home and something meaningful to do. A collaborative start up fund of £500k is required to pump prime a new approach.	Paradigm shift in culture and practice to integrated working across sectors and services to provide a genuinely person centred and preventative approach.





Construction and Development

Introduction from Group Chair, Sir Steve Smith.

The Construction and Development recovery group has been an inspiring group to work with over the past few months. There is a sense of a single purpose between the group members and a drive towards a common goal which seeks not only to build a strong recovery for Exeter and the surrounding region, but to do so with people and place at the heart of plans and continue to build a resilient city which is ready for the future.

This will and desire to work together is of course extremely important because the construction and development sectors underpin many key economic opportunities in the region. The construction sector alone contributes £1.2 billion GVA to the region. Exeter has a central role to play in enabling these opportunities, with three of the five largest construction firms based in the region and home to 22,000 construction operatives in total (1.2% of the UK total). Furthermore, the city is committed to delivering high quality housing to meet forecast demand and the needs of its residents, and ensure sustainable growth in the city.

While long term prospects are still unclear as the sector, which is always vulnerable during downturns, will have to adapt to lasting consequences of the crisis, it has been heartening to see that the return to building sites has been swift, albeit at reduced capacity and productivity (25% lower than February levels during June), whilst confidence in the market has, so far, continued. It remains to be seen what the longer term effects of Covid-19 will be in terms of commercial uses within our towns and cities, but the impacts could be severe, and the work of the other recovery groups is welcome in considering how we can support our businesses and the city centre as we look to recovery.

Through its work, the group has identified a list of interventions which will support the city to build back better and equip it to be at the leading edge of a sustainable growth and inclusive recovery.

These interventions, detailed in the table overleaf, offer the city and its partners immediate opportunities to stimulate recovery and include:

- Direct capital investment to unlock growth and support the construction sector
- Opportunities to upskill young residents in sustainable construction methods to support the city's Net Zero Plan

These opportunities give Exeter every chance of continuing on the path of growth it was on before Covid-19 and with a focus on clean and inclusive growth. Exeter has a vibrant cultural sector, recently acknowledged with the Unesco City of Literature status; a thriving student population and an outstanding location that gives residents and visitors an unrivalled coastal and countryside location. These strengths will ensure growth, not just for Exeter, but for the greater region too. Exeter is ready to become a city of the future. A city that's prosperous, innovative, healthy, inclusive and sustainable; a city that will continue to be a wonderful place to live.



The construction sector alone contributes £1.2 billion GVA to the region.

“Exeter is the backbone of the region, and a successful city means opportunity for the surrounding region too.”

ACTIONS	ASKS	OUTPUT
Major City Capital Projects:		
Delivery of the University of Exeter's 'North Park' research facility.	<ul style="list-style-type: none"> ■ £72.5m of grant funding to support the University of Exeter's 'Project North Park' a major research institution which would unlock £8m of research potential annually and generating £65.5m of GVA over 10 years. 	Unlock £8m of research potential annually and generate £65.5m of GVA over 10 years and as well as generate construction jobs.
Progression and delivery of the City Point mixed use development in the heart of Exeter city centre.	<ul style="list-style-type: none"> ■ £12m of investment to support the progression of technical and feasibility work, undertake preparatory site enabling works and complete public realm works ■ Commitment to the co-location of a Government Hub to anchor the office scheme. ■ Funding to support the development of affordable and flexible workspace as part of the scheme, potentially allied to an Innovation Zone which will support start-up and micro businesses as well as innovation and creativity. 	Investment will unlock £300m of development, delivering up to 500 new homes, 200,000 sq ft of office accommodation (supporting 1,850 jobs) and completing the St Sidwell's Point development which is already on site and under construction.
Liveable Exeter Programme:		
Funding and continued partner support to facilitate the progression of the Liveable Exeter programme.	<ul style="list-style-type: none"> ■ Up to £1.2m of Homes England Garden community funding (from Homes England) for the Liveable programme. ■ Support from other partner organisation to assist in the progression of the Liveable programme to realise shared aims and objectives. 	The delivery of the Liveable Exeter programme and ECC's Vision 2040.
The formation of a Strategic Place Partnership with Homes England, supporting the delivery of new homes and communities within the city through significant investment and the formation of a long term, sustainable delivery vehicle.	<ul style="list-style-type: none"> ■ A strategic partnership with Homes England unlocking significant central Government funding to support the delivery of new, quality homes and communities. ■ Continued refinement and development of the City Fund model. ■ A focused 'Stalled sites fund' bringing funding, skills and resources to unlock stalled housing sites within the City. 	Stalled sites fund and associated resource could begin to unlock sites to deliver new homes for Exeter (believed to total circa 1400 homes).
Commissioning and delivery of Masterplan for Marsh Barton.	Up to £500k of funding to support the development and delivery of a Masterplan, and associated business case for Marsh Barton, setting out the case and timetable for further investment and steps for redevelopment.	A masterplan for Marsh Barton will support the unlocking of this major regeneration opportunity and support the delivery of up to 5,500 new homes - alongside the re-provision and reincorporation of employment space for the City.
Commitment to work with partners' to ensure new development supports, can benefit from and protects the natural environment - including the exploration of opportunities to enhance biodiversity and natural habitats.	Continued joint working with partners to realise share objectives.	Exploration and promotion of opportunities to support the natural environment.



ACTIONS	ASKS	OUTPUT
Housing Delivery by Exeter City Living & Exeter City Council		
Continued development of new homes for the city; delivering much needed accommodation, showcasing opportunities for low carbon housing development and creating sustainable, active and inclusive communities.	Grant funding of £6.8m to unlock and accelerate the delivery of up to 500 new homes across existing Council-owned sites in the city in the next five years.	Unlock £76.85m of capital construction projects, delivering up to 500 new homes in the city centre by 2025.
Training & Education in the Construction & Development sectors:		
All partners to commit to ensuring that an Employment and Skills Plan (ESP) is in place on their projects to demonstrate and enable commitment to jobs and training. Collaborative working with planning, procurement, partners and Building Greater Exeter.	All key partners delivering major projects (over £1m) in Exeter to ensure an Employment and Skills Plan is in place and being delivered. (partners; public sector organisations, education, housing associations, planning departments, Exeter City Living).	Opportunities provided across the city for employment and skills in the construction sector, ensuring a robust and skilled workforce to deliver our infrastructure and housing. Building Greater Exeter to lead on reporting combined output from all ESPs to demonstrate cumulative output.
A package of Support for the Supply Chain (particularly SMEs and Micros businesses) to better understand and easily access training and recruitment opportunities. Linked to promotion of the 'pipeline' of work for the area, available incentives, shared apprenticeship schemes, opportunities for the existing workforce and promoting vacancies (Job Shop).	Collaboration and co-operation from clients, planning and procurement to provide clarity around the pipeline. £50k for a co-ordinated and high profile communications campaign to ensure that the sector is well informed about the national and local support available to them.	Engagement of Small and Micro businesses in skills and training. At least 250 businesses engaged.
Ensuring that our local partners, supply chain and Micro / SMEs gain maximum benefit from the CITB Skills Stability Plan, including; <ul style="list-style-type: none"> ■ Mental Health Training ■ Skills and Training Funds ■ Relationships with FE provision ■ Apprenticeship Travel Support 	CITB to provide a defined action and investment plan for Exeter, with defined outcomes for all areas of their skills stability plan, and in particular to focus on the relationship with FE provision.	Exeter-based construction businesses able to gain maximise investment from CITB funds.
A Passivhaus Academy would support Exeter's net-zero goals and build on the successful delivery of existing Passivhaus and healthy buildings in the city. The academy will provide a focal point for the essential skills needed to deliver new buildings, and the requirements for retro-fit, providing a workforce that is skilled, knowledgeable and professional. Training and skills development will be delivered in a purpose built centre in the city, and also through an online platform, to support reach beyond the city and region, sharing our skills and experience to as wide an audience as possible.	£1m for a detailed business case, deliver training facilities, develop appropriate curriculum, marketing and promotion. Up to £10m to support the delivery of a new Passivhaus training centre.	A world-leading Paasivhaus training academy for Exeter, cementing the reputation as a centre of excellence in the delivery of healthy buildings.



£80m would unlock £8m of research potential per year which is predicted to generate £65.5m GVA over 10 years



Support the future workplace through investment in the ESP



Water Lane: 1,500 new homes for Exeter



£1.5m of funding to expedite a trial of retro-fit across 50 council properties with the greatest potential for energy performance uplift and targeting areas with existing fuel poverty issues



Education

Introduction from Group Chair, Glenn Woodcock.

The Education recovery group brings together key representatives from across the education sector in Exeter; primary, secondary, further and higher education. This ensures that the 25 primary schools, five secondary schools, Further Education College and the University are all fully engaged in the work that is taking place.

As a city we have much to be proud of in relation to our education; the Exeter Mathematics School is Ofsted Outstanding, Exeter College is Devon's only Ofsted Outstanding Further Education College and the University of Exeter consistently ranks highly in University league tables.

The group has adopted a collaborative approach to working in order to identify the key challenges faced at all levels of education, and to highlight those that require the most urgent intervention and support, at a city-wide level. It is well documented that the education sector has had to rapidly adapt, and adopt new ways of working in light of the pandemic and the 'lockdown' period. This has presented a number of challenges for teachers, parents and students to ensure that learning can continue and that our young people are supported. The key challenge in responding to the Covid-19 situation for all of our institutions is digital. We have seen some incredible innovation at speed from our education colleagues over the past few months to enable our young people to learn away from the classroom, and for teachers/lecturers to be able to support them. However, it has been acknowledged that there continues to be challenges in relation to digital that need to be addressed to achieve levelling up for our young people.

- **Digital Inclusion:** access to suitable devices for learning, access to broadband and skills within the household to support learning
- **Teacher Capability:** to maximise the use of online learning, to develop more and better skills to be able to support and deliver online learning and to develop engaging content.
- **Consolidation of Platforms:** particularly across our primary community where a wide variety of platforms are being used to deliver learning to the city's children.

The combination of these issues is a significant challenge for the city to address in partnership, pulling on the skills and expertise of all of our organisations and partners to provide sustainable solutions. The group have identified where there are existing initiatives in place that should be utilised – national and local - but the gap is still substantial.

Our particular focus is on digital inclusion - ensuring every young person has access to an appropriate device for learning, and that there is support available for learning to successfully take place at home.

The individual asks are set out overleaf. The cost of addressing these, and ensuring that as a city we can provide remote and online education that all of our young people can access, that is supported both by the teaching community and in the home is estimated to be c. £600,000.

Our particular focus is on digital inclusion - ensuring every young person has access to an appropriate device for learning, and that there is support available for learning to successfully take place at home.

ACTIONS	ASKS	OUTPUT
Education:		
To provide an appropriate device for learning for every child at primary and secondary school in Exeter, over and above those that can be supported with central Government funding.	£525k to supply at least 1,500 devices to schools in Exeter.	Every child in Exeter has access to a device to be able to learn effectively from home when needed.
A study to determine the skills gaps that are experienced by parents and carers that are preventing full support of their children to effectively learn from home. This will support the identification of the most appropriate resources to provide access and signposting to.	University of Exeter to undertake this piece of research.	A set of recommendations about appropriate resources that can be provided to parents/carers.
Set up a service to help parents and carers deal with the technical, practical and emotional difficulties of remote education. Technical support to be made available by phone and email, along with a simple web portal to support common issues.	£50k to run and promote the technical helpline for one academic year.	Parents/Carers feel supported and are able to fully support their children to access learning from home.





Transport

Introduction from Group Chair, Mike Watson

The Covid-19 pandemic has presented many challenges to the transport and logistics sector in Exeter, as it has in the rest of the country. However, for Exeter, these came just after the closure of Flybe in March, which had already lead to 1,000 job losses across Devon. Yet lockdown has also given us a rather unexpected opportunity to think differently about how we move around our city, transform our environment and bring forward the drive to reduce carbon emissions that was begun prior to lockdown. Short-term, pop-up measures have been implemented quickly in response to the pandemic and have demonstrated how changes, supported by residents, can be made to our existing infrastructure to facilitate more walking and cycling, pointing to opportunities for permanent change in the city.

Now that face masks are mandatory on public transport, it has been positive to see bus passenger numbers recover to 60% of pre-Covid levels. We are keen to encourage more people to use public transport and Stagecoach have put a number of measures in place to support this, including a social media campaign to offer customers reassurance and of course enhanced cleansing measures. As confidence improves we believe it will help support important behavioural shifts in people's travel routines.

However, it is interesting to see that the occupation of Council car parks has returned to 70% of pre-lockdown levels, whilst traffic at peak times is back to 96% of pre-lockdown levels. This demonstrates that we only have a finite window in which to effect change and that achieving a carbon-neutral and active city will require significant change, not least in people's behaviour. It's difficult to just say 'abandon the car', indeed, it's unrealistic. But what we can do is use this time of change to sample travel by bus, train, foot or bike as an alternative to the car. If everyone who can took a mode of active travel just once a week that would contribute to a 10-15% reduction at peak times and congestion would disappear.

The Exeter Transport Strategy set out an ambitious, but realistic, approach to transport which are embodied in the three key themes:

- Greater Connectivity will see enhancements made to key transport corridors in the travel to work area in order to support productivity growth.
- Greater Places for People will see increases in the number of trips being completed on foot or by bike, aiming to deliver the Exeter City Council's aspiration of making Exeter the most active city in the country.
- Greater Innovation will see Exeter City Council and Devon County Council looking to utilise new and innovative technologies to make travel easier and help the city's transport networks operate more flexibly and efficiently.

Exeter is ready to embrace change and lead the country as an exemplar of how positive interventions in clean growth can deliver significant sustainable growth and a multitude of economic, social and environmental gains. The proposals set out within this document seek to deliver the kind of development that the city wishes to see; facilitating growth and enhanced connectivity, but also ensuring that we meet our wider social and environmental ambitions.

Indeed, we are already planning for the future, and Stagecoach and Devon County Council, supported by Exeter City Council, have already submitted an expression of interest for funding to become the country's first all-electric bus city.



If everyone who can took a mode of active travel just once a week that would contribute to a 10-15% reduction at peak times and congestion would disappear.

"I'd like to see green corridors across the city so people can walk and cycle with their families and feel safe away from cars."

Resident voice, ECF Net Zero Plan

Future Transport proposals are set out within the Exeter Transport Strategy and are captured within Exeter's Transport Infrastructure Prospectus. These have been developed alongside other emerging land use proposals, including the Liveable Exeter programme. The Infrastructure prospectus sets out the need for £100m of investment in transport infrastructure to support the city's growth between 2020-25 with £50m of this to be funded by local authorities and development. The balance of this (£50m) needs to be secured through external funding sources and, whilst £20m of this has already been secured, a further £30m is required for the city to implement the full suite of interventions identified within the infrastructure prospectus. Several of the asks contained within this document relate to or support the interventions identified within prospectus and strategy, and relate to the £30m of funding required to support the necessary interventions. This demonstrates a real commitment and joined up approach on behalf of the city and its partners' to plan future communities to incorporate sustainable and active travel infrastructure at their heart and ensure that existing communities benefit from enhancements to existing infrastructure.

Emergency Active Travel Fund (EATF) interventions, established in response to the effects of the pandemic, saw the rapid delivery of cross city cycle routes between key employment sites and these have proved to be successful – with plans now progressing to implement several of these on a permanent basis. It is transformational opportunities such as the all-electric bus bid, along with some of the smaller interventions outlined within this report and demonstrated through the EATF interventions, which offer us a real opportunity to build back better and develop transport infrastructure which will allow the city, its residents and businesses to prosper and ensure that Exeter remains a brilliant place to live, work, study and visit.

"We recognise this moment for what it is: a once in a generation opportunity to deliver a lasting transformative change in how we make short journeys in our towns and cities... The government therefore expects local authorities to make significant changes to their road layouts to give more space to cyclists and pedestrians. Such changes will help embed altered behaviours and demonstrate the positive effects of active travel."

Grant Shapps, Secretary of State for Transport

ACTIONS	ASKS	OUTPUT
Investment in Public Transport:		
Investment in an all-Electric bus fleet for Exeter	£32m of Government investment sought - to lever total investment of up to £82m in a new electric bus fleet and associated infrastructure	To support the City's net-zero carbon ambitions, drive innovation and reduce pollution. Continued promotion of the bid between partners.
Investment in Exeter railway stations	£3.1m of investment in Marsh Barton station Continued partner working and investment to support the development of St David's station to deliver an enhanced station and city gateway and support the delivery of new residential and commercial accommodation. Continued partner working to support the continued investment in rail infrastructure serving Exeter and the wider Greater Exeter region.	Investment in Marsh Barton station will unlock a further £10m of investment in a scheme to be delivered in 2021 (tbc) and support the delivery of key Liveable Exeter sites at Water Lane and Marsh Barton. Investment in St David's will deliver a revitalised City Gateway, supporting growth and regeneration. Investment in the wider South West network will continue to supports Exeter's economic growth.
Digital Innovation and Clean Growth:		
City wide roll out of e-bikes, electric vehicles and electric vehicle infrastructure, joined up by delivery of a single ticketing platform	£7.5m	Extensive Roll out of shared travel choices, linked with (all electric) bus to create potential for a zero emission transport subscription service.
Promotion and delivery of strategic mobility hubs to serve key developments/area of demand within the city	£8m	Mobility hubs offer the opportunity to develop physical hubs (buildings) where e-bikes, subscription cars, public transport and freight consolidation could all be provided - alongside community/communal facilities. Anchoring new developments, these will promote and support low car/zero car development and support the net-zero commitment/ Liveable Vision.



ACTIONS	ASKS	OUTPUT
Investment in Strategic Infrastructure:		
Funding to support Highways alterations to support city centre growth and redevelopment	£5m to support work to rationalise Acorn Junction (nr Cathedral & Quay) and highways at South Street/Magdalen Street	Investment will support improved highway efficiency and release land for housing delivery and placemaking, supporting Liveable Exeter ambitions.
Investment in strategic bridges and river crossings, facilitating integrated active and public transport	£8m supporting the delivery of a new pedestrian and cycle bridge at Haven Banks, the replacement of Mallinson Bridge, the upgrading of Salmon Pool swing bridge and upgrading of Clapperbrook bridge	Investment in Strategic sustainable travel and public transport Infrastructure will support modal shift, reduce reliance on cars and support movement towards zero carbon travel. A new walking and cycling bridge at Haven Banks would support new communities at Water Lane and Marsh Barton and add to existing infrastructure. The replacement of Mallinson Bridge would support walking and support the vitality of, and investment in, the Quay. Upgrading of Salmon Pool would support strategic walking and cycling. Upgrading or replacement of Clapperbrook would support development in Water Lane/Marsh Barton and sustainable travel options.
Walking and cycling measures		
Upgrading of city-wide cycle network (routes E4 and E9)	£12m	Routes E9 (Sowton/Pynes Hill to Digby and Sowton) and E4 (Pinhoe to City Centre, including section to St David's/Uni) to support active travel and link to other planned improvements/meet expected demand.





Visitor Economy: Tourism and Culture

Introduction from Group Chair, Lord Charles Courtenay, Earl of Devon.

The Visitor Economy Recovery Group has been effective at working at the heart of supporting Greater Exeter's Visitor Economy from the ramifications of Covid-19. The multidiscipline group has been focussing on both a strategic response to the fast moving situation and also practical and hands on support. Teams of officers and partners from across the industry will continue to meet and assist as the visitor economy navigates unprecedented challenges.

Strategic objectives and measured outcomes of the live planning documents will be adapted accordingly.

Through its work, the group has identified a list of interventions which will support Exeter's visitor economy to safely re-open, create a varied programme of rich cultural and heritage experiences; and to allow Exeter to build back better as a leading, sustainable and inclusive visitor destination. The interventions, detailed in the table overleaf, offer the city and its partners immediate opportunities to stimulate recovery and include:

- **Enhancing the visitor experience:** Through direct capital investment into infrastructure, and the use of data and digital technology to enhance the visitor experience, Exeter will become a leading sustainable visitor destination;
- **Investment and commitment to the arts, heritage and cultural sector:** Exeter's place-based Cultural Strategy identifies the ways in which investment in this area can be a significant contributor to the city's growth and how we can work towards a shared cultural agenda where culture is a revitalising force for residents, businesses and visitors.



The visitor economy contributes £155m GVA to the city.

We can work towards a shared cultural agenda where culture is a revitalising force for residents, businesses and visitors.



Tourism

Exeter is one of the most vibrant, attractive and historically interesting cities in England. Pre-dating the arrival of the Romans in AD 50, its rich history is reflected in its fascinating visitor attractions such as the magnificent Cathedral, multi - award winning Royal Albert Memorial Museum and Art Gallery and unique Underground Passages. Exeter has a real sense of individuality, it is renowned in the south west for its independent arts scene, and for the quality of its locally produced food and drink.

The visitor economy contributes £155m GVA to the city. For the January to July 2020 period it is estimated that approximately £2.2 billion of anticipated tourism business turnover has been lost in the Great South West region due to the Covid-19 pandemic. In addition, it is estimated that approximately £232 million would have been the usual amount of supply chain spend associated with this amount of turnover on the purchase of local goods and services in Devon. The asks outlined in this document focus on support for tourism and hospitality businesses in their journey of building back better. They are based on a set of key themes identified as challenges for the industry. These include, access to real time data; seasonality; changing consumer needs in a post-Covid world and reduced visitor numbers. These challenges need careful consideration when managing Exeter as a visitor destination in a post-Covid world, and should be integrated into activity under the priorities set out in the Visit Exeter Tourism Marketing Strategy 2018-2020, outlined below.

- Raise the profile of the city locally, regionally, nationally and internationally to the short break and groups market, through more effective and targeted visitor marketing and partnerships, maximising Council spend.
- Raise the profile of the city as a destination of choice for business tourism and conferencing.
- Raise the profile of Exeter as a destination for culture and heritage, working alongside and in support of Exeter's Cultural Partnership.

Exeter has a real sense of individuality, it is renowned in the south west for its independent arts scene, and for the quality of its locally produced food & drink.



Culture

Exeter's Cultural Strategy outlines five key themes which have been used to structure the recovery strategy for this group:

- City of Culture and the Environment – pioneering environmental responsibility and innovation through culture.
- City of Culture and Wellbeing – revitalising force to deliver a positive impact on health and wellbeing.
- City of Heritage Innovation – culture plays an active role in engaging with the past and nurturing possibilities for the future.
- City of Creative Making – supporting creative practice with a growing strength in independent cultural production.
- City of Cultural Literacy and Learning – culture provides pathways to participation across the civic and social life.

There are some recommended cross-cutting priorities that the city needs to focus on to be successful in the delivery of the Cultural Strategy. These include improvements around partnerships, internationalisation, communications, evaluation, and the relationship with businesses. The strategy contains some specific actions for each themed area which have been included in the table overleaf.

Exeter was granted UNESCO City of Literature status in 2019. This is set to play a significant role in Exeter's civic and cultural recovery and future. The financial ask below for investment to establish Exeter's UNESCO City of Literature office would be a crucial step to support the recovery plan as it supports Exeter's Place Based Cultural Strategy and its cross cutting priorities.

It is expected that leadership of each of the interventions detailed below will be undertaken in partnership with relevant groups and organisations. For Arts, Culture and Heritage this will be led by Exeter Culture, and for tourism, Visit Exeter, Visit Devon and VisitEngland.



Exeter was granted UNESCO City of Literature status in 2019

Should investment for the interventions be forthcoming, it has been recognised that further research and development into the financial asks would be required. The Culture Innovation Consultancy at the University would be able to support an investment strategy for the Arts, Culture and Heritage Sector specifically. Working in partnership with Visit Exeter, Visit Devon and VisitEngland, the investment for Tourism would be further refined.

In the immediate to short term, the Visitor Economy Recovery Group has also highlighted the need to consider how the hospitality sector may require additional support during the 2020 autumn/winter season to continue trading. It has been suggested that investment is needed for outdoor spaces in the city. The group would like to propose investment in 'igloos', an intervention that is not only a practical step to support recovery by creating safe spaces for guests to socialise within their bubbles, but it would create an experience, a reason to visit Exeter, that would encourage footfall and support the night-time economy.

Investment is needed for outdoor spaces in the city to create safe spaces for guests to socialise within their bubbles and give people an experience, another reason to visit Exeter, that encourages footfall and supports the night-time economy.



ACTIONS	ASKS	OUTPUT
Exeter as a City of Cultural Literacy & Learning:		
Nurturing Talent Ensure that the talent of the city's growing youth population is nurtured, providing accessible routes to cultural participation creating opportunities for development and upskilling.	£50,000 Commitment of key strategic partners in Exeter to provide apprenticeships/internships in the arts, culture and heritage sector. Support a creative development programme for the city where culture provides pathways to participation across the civic and social life.	An increase in the number of young people living and working in Exeter. Increase in spend across the city centre. New activities for young people. Stimulating innovation in Exeter and new ways of working.
Exeter as a City of Cultural Literacy & Learning:		
Invigorating Partnerships Evaluation Enable performance based venues in Exeter to feel confident to re-open safely and share best practice with performers and artists to develop new and existing work.	£25,000 Commitment to implementing the 'asks' outlined in the research study currently being undertaken by Tom Fleming Associates on behalf of Exeter Culture.	Shared and joined up programming for Exeter. Shared best practice guidelines for performance venues which will support smaller and independent Creative practitioners to develop new and existing work. Understand the impact of Performing Arts Venues in Exeter and how they contribute to the local economy.
Exeter as a City of Creative Making:		
Enhance and re-shape the entertainment and cultural offer in the city centre, add to the UNESCO City of Literature Status and Exeter being a leading cultural city, attracting a wider range of people to the city centre.	£35 million Develop Exeter Corn Exchange into a multi-purpose art/workspace venue. Up to £30m of funding from the Arts Council to support the development of a fit for purpose art/workspace venue for Exeter: either in a new venue, or through the refurbishment of the Corn Exchange. The Council will seek to match fund this project. Establish the office of the Director of Exeter's City of Literature Programme.	Development of the night time economy. Additional space for culture. New pop-up space for artists. Vacant units re-purposed. Increase in footfall. Opportunities for independent creative practitioners. Supports Exeter as a model city for diversification, creative resilience and inclusive growth.

Arts, Culture and Heritage



ACTIONS	ASKS	OUTPUT
Exeter as a City of Cultural Literacy & Learning:		
To develop a model for event training and volunteering d. As venues begin to build back diversity needs to be embedded in all cultural and planning production.	£60,000 <ul style="list-style-type: none"> ■ Commitment from partners to:- support an initial study into diversity within Exeter's NPO organisations. ■ Develop a volunteering programme. ■ Covid-19 training for events and performing arts. 	<ul style="list-style-type: none"> ■ development of a city-wide road map to support confidence in addressing and talking about diversity in Exeter. ■ enables representation of organisations at board level ■ contribution to cultural programming in the city which reflects the full range of backgrounds and perspectives in our society. ■ a renewed focus on cultural and heritage organisations. ■ an active appreciation of and appetite for cultural activity making.
Exeter as a City of Heritage Innovation, Creative Making and Cultural Wellbeing:		
Audience development and engagement	£20,000 <p>Develop a Creative Programme of Culture and Heritage in Exeter that makes its cultural offer part of its identity, attracting a wider range of people to the city centre.</p> <p>Explore new and innovative forms for audience engagement to include the creation of innovative and digital.</p>	<p>Enhanced contribution to city's unique identity and distinctive visitor experience.</p> <p>As part of the city centre's offer, heritage attractions help drive footfall and increase dwell time.</p> <p>Greater engagement and participation with heritage enriches the city's cultural offer and range of activities available to visitors.</p> <p>More people – including visitors - use heritage resources and experiences to create special memories; inspire individual and collective creativity or feed well-being.</p> <p>Innovation and digital deliver new opportunities to promote and explore the city's heritage; broaden audiences and extend the city's reach.</p>

Arts, Culture and Heritage



ACTIONS	ASKS	OUTPUT
Visitor Analysis:	<p>Gain an enhanced understanding of Exeter's tourism offer, impact study and product development research.</p> <p>£20,000 There may be the opportunity to access VisitBritain's Tourism Data Hub (not yet live) and other existing studies.</p> <p>Undertake an extensive study to gather data on visitors to Exeter, e.g.:</p> <ul style="list-style-type: none"> ■ Where they come from ■ How they research & book ■ How they travel ■ Where they stay and what they do ■ Perceptions of Exeter ■ Ethnic origin ■ Additional needs, e.g. accessibility <p>Investigative study into Exeter's tourism offer, to better understand what the city offers in terms of:</p> <ul style="list-style-type: none"> ■ Tourism product ■ Accessibility ■ Inclusivity ■ Information ■ Transport infrastructure <p>Gap analysis to identify tourism product/infrastructure needs.</p>	<p>Enhanced understanding of visitors for improved, and more cost-effective targeted marketing campaigns.</p> <p>Understanding of what products are needed to enhance the visitor offer and attract investment.</p>
Making Exeter a Business-destination:	<p>Initiate stronger partnerships between venues, accommodation providers and other organisations in the city to enhance the business tourism offer.</p> <p>Work with national and multinational companies in the city to identify opportunities for business visits to Exeter.</p> <p>£10,000 Provide a digital platform and opportunities for businesses to link up.</p> <p>Produce themed itineraries and bookable packages to combine business visits with leisure.</p> <p>Develop a fund to offer incentives for business visitors to extend stay, to be provided through successful venue partnerships.</p>	<p>Drive off-season visitors and increase market share in the business visits and events sector.</p> <p>Extend length of business stays and increase spend.</p>

Tourism



Business Tourism

ACTIONS	ASKS	OUTPUT
Innovative use of digital tech to support marketing the city:		
Utilise digital technology to enhance content assets for marketing, and enable more targeted marketing communications. Enable the business, tourism and arts, culture and heritage sector to be better equipped to use digital. Increased staff resource for tourism marketing.	<p>£20,000 - Video/photography £30,000 - Staff resource</p> <p>Grants of up to £3,000 per eligible business, through the Growth Support Kickstart Grant Scheme.</p> <p>Build on bank of image and video content of Exeter.</p> <p>Develop better quality information for visitors, utilising VR, AR, online booking and accessibility tools.</p> <p>Develop learning partnerships with existing, successful projects such as Exeter Cathedral AR Project / University of Exeter.</p> <p>Provide training on digital marketing for businesses.</p> <p>Provide support for businesses to use technology to enhance the visitor experience and meet changing needs, such as ordering apps, virtual assistance and online check in, etc.</p> <p>Additional staff resource focused wholly on Visit Exeter.</p>	<p>Improved communication of Exeter's offer leading to increased awareness and visitor numbers.</p> <p>Improvements in accessibility of content.</p> <p>Provide disabled visitors with experiences of Exeter they may not ordinarily be able to access.</p> <p>Equip visitors with increased knowledge to improve feelings of safety prior to travelling.</p> <p>Increased marketing output, increase in year-round visitor numbers.</p>

Tourism



Sustainable Tourism



ACTIONS	ASKS	OUTPUT
Hospitality sector support	<p>Support Exeter's visitor economy and food and drink culture over the Autumn and Winter seasons by providing socially distanced, six person domes for private hire.</p> <p>£30,000</p> <p>To support the thriving visitor economy throughout October, November & December, we propose hire and installation of eight self-contained dining domes to be situated in close proximity to local eateries. They will be used as extra covers for the responsible business and will provide a safe experience for customers.</p> <p>Locations subject to planning: Princesshay x2 Guildhall Dining x2 Topsham Quay x2 The Quay (Piazza Terracina) Exeter Cathedral</p>	<p>Increase in visitors</p> <p>Enhanced reputation of doing things differently.</p> <p>Greater spend within the city.</p> <p>Exeter seen as an inviting visitor destination / encouraging repeat visits.</p> <p>Exeter seen as a safe visitor destination.</p>

Immediate tourism support



Conclusion

Like many places across the world, Exeter is now in the process of returning to a “new normal”, albeit with all the challenges of driving economic recovery while keeping Covid-19 at bay. The path to recovery will not be straightforward and is likely to be interrupted by recurrences of the virus, which will in turn drive risk aversion, lower business optimism and limit anticipated levels of activity. Therefore, to be as successful as possible for the city’s residents and for the wider regions Exeter needs support across the key areas identified in this document.

Thank you for your interest in the City of Exeter. If you would like further details please contact:
buildbackbetter@exeter.gov.uk



With thanks to:

Business Support

Matt Roach, Exeter Airport
 Cllr Emma Morse, Exeter City Council
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 Steve Chown, Chief Executive, Exeter Community Initiatives and Exeter Connect
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 Inspector Anthony Hart, Devon and Cornwall Police; Chair, Exeter Community Safety Partnership
 Amanda Kilroy, CoLab, Exeter
 Julian Tagg, Chair City Community Trust
 James Watmough, Sport England
 Sarah Ylland, Officer Devon Community Foundation/Wellbeing Exeter
 Andrew Hardwick, Exeter City Futures
 James Bogue, Active and Healthy People, Exeter City Council
 Claire Cheminade, Sport England LDP, Exeter City Council
 Melinda Pogue-Jackson, Community, Environmental Health, Exeter City Council
 Dawn Rivers, Communities, Active and Healthy People, Exeter City Council
 Emily Traynor, Sport England LDP, Exeter City Council

Construction and Development

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 Bindu Arjoon, Director, Exeter City Council
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 Russell Baldwinson, LiveWest
 Paul Crawford, LiveWest
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