EXETER CULTURAL STRATEGY 2026–31

A baseline report of the cultural city we know.

Tasked with developing a new Cultural Strategy for the city, we at InPlace knew there had been a lot of work done here previously – a lot of investment of time, expertise and heart has gone into studies of creative life and potential in Exeter. Before listening to people directly, we wanted to compile the most up-to-date story possible, of data, insights and experiences.

CREDIT: RAMM

Exeter City Council

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Exeter City Council

Exeter has many flows. But what are its boundaries?

CONTEXT

Geographic scope.

The Cultural Strategy has a general boundary of Exeter's own. But its influence will be felt in a radiation out into wider East Devon. With Local Government Reorganisation an uncertainty, however firm the submission for the next shape of civic structure in the city, we are preparing to our current parameters while keeping a wider context of influence loosely in mind.

This is a city of flows, after all, deeply connected to its surrounding countryside through trade and culture.

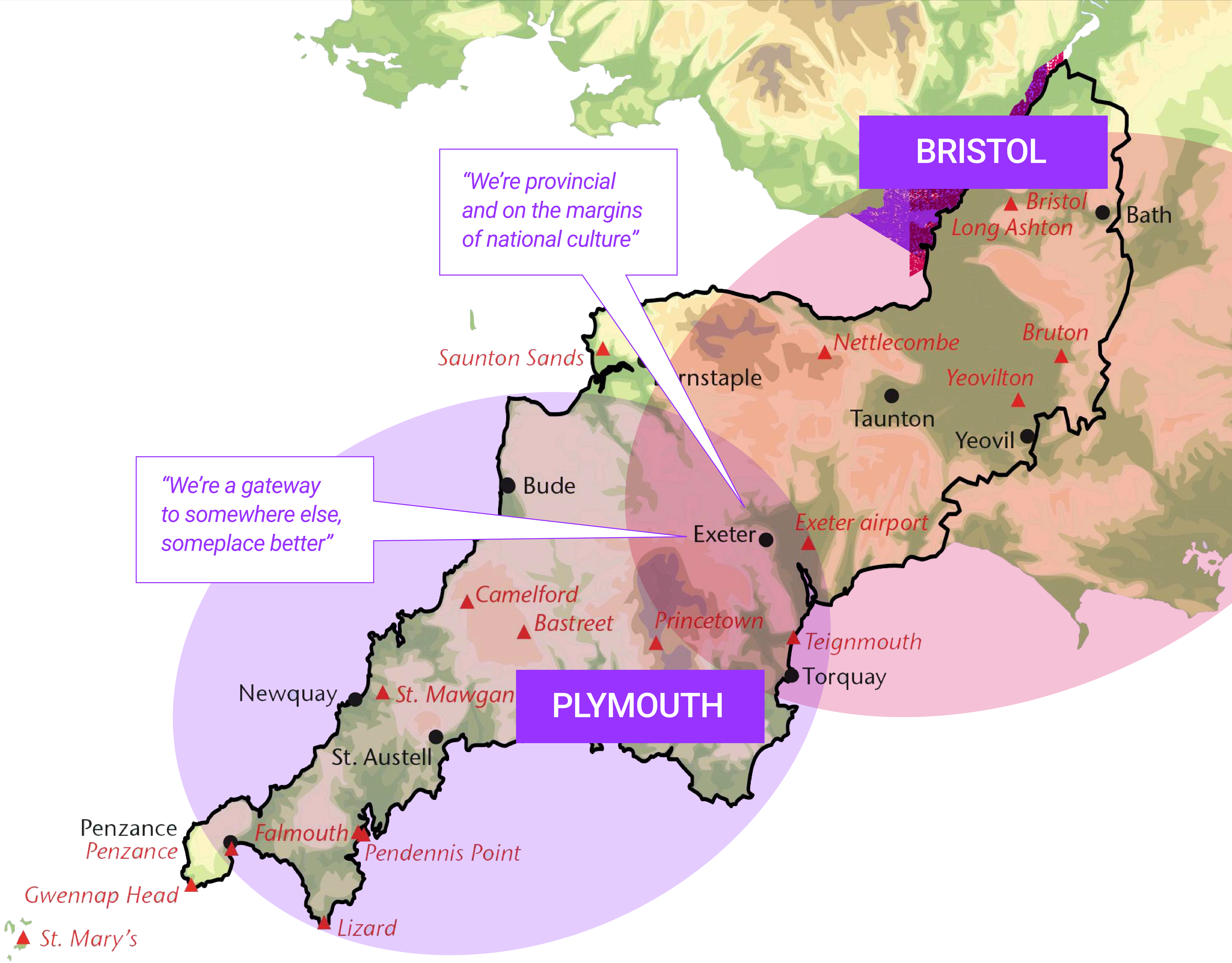
However, how do we picture our context currently?

CONTEXT

Geographic scope.

Despite how clearly civic leaders see its place in the region strategically, wider Exeter easily tends to refer to itself as a bit fringe to other cities or locations. In listening to people, it seems to be a temptation to fall into verbalising – *surely people think of other places first?*

But there is another way to frame it.



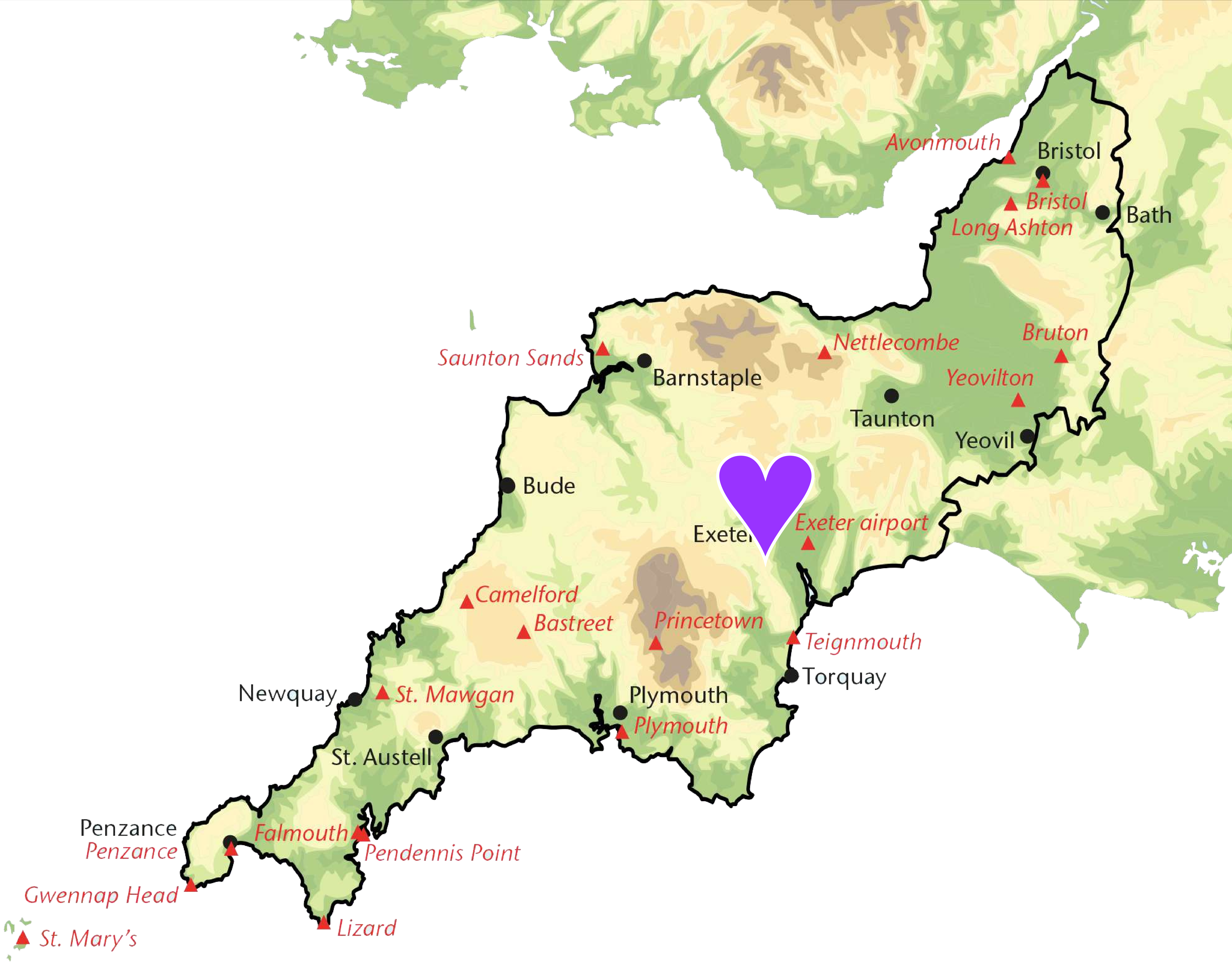
CONTEXT

Geographic scope.

Exeter is at the centre of the South West Peninsular, one of the UK's 11 distinct regional climates. It is the regions commercial and cultural beating heart.

Exeter is not on the edges, it's bang in the middle.

The city is at a crossroads from many places, including strong international connections.



DEFINITION

The word *culture* – what do we mean?

We use the word 'culture' to describe all the activities falling within different artforms. These include theatre, visual arts, music, dance, film and literature. This is also about heritage assets and the creative activities delivered by libraries.

Culture can be experienced in different formats – within a building or outside at a festival. People can also experience culture in different ways – as a member of an audience, or as a participant where they take part in a class or a workshop.

We also talk about 'creativity' which means imagining, expressing or creating something new in one of the art forms under the definition of culture. Anyone can take part in creativity, informally or formally, as an amateur or professional.

The 'creative industries' encompass the different artforms we've referred to under 'culture' and also include some additional professions, sectors and new technologies. We use the term to relate to industries which have their origin in individual creativity, skill and talent, and these industries encompass advertising and marketing, architecture, crafts, design and designer fashion, film, TV, radio and photography, museums, galleries and libraries, music, performing arts and visual arts, publishing, IT, software and computer services, including video games.

We use the term 'creative practitioner' to describe someone who works in the creative industries.

Charles Landry makes an additional point for our purposes. In his well-received paper: *An opportunity in the making: Exeter and its creative placemaking*, he says:

"Culture is everywhere, it is all-embracing, it is the fabric of what we are and the air we breathe and since it is difficult to see outside of ourselves it can appear invisible. Culture is who we are, how we behave, what we think and so shapes our mindscape and fashions the physical fabric and landscapes we build and defines our economy, our social life, our cities, our use of technology. Our creativity determines what we can become. It runs through our lives like our unseen nervous system or electricity."

Like nature, culture is no respecter of boundaries. Culture is for everyone, and it's everywhere. It's what makes us human.

ASSETS

Partnership mapping.

Exeter possesses a wide-ranging eco-system of partnerships with a cultural focus and there is some overlap, and is set against a challenging funding landscape and changes in policy focus by lead organisations.

Current Cultural Partnerships:

The Exeter Partnership exists to bring together the city's key stakeholders to collaborate and develop innovative strategies to drive forward the city's key priorities across culture, climate, housing, city centre and health. The Connected Culture Theme Group champions culture within the Partnership and its members include the Council's cultural and tourism services, Exeter College, Exeter University, Exeter Cathedral, UNESCO City of Literature, Northcott Theatre, Exeter Phoenix, RAMM, Devon & Exeter Institution, Arts Council, Historic England and Earl of Devon, Co-Chair of the Exeter Partnership.

The UNESCO City of Literature Partnership Network brings creative and cultural partners together with a focus on literature and storytelling. It's vision is for storytelling and culture to connect every community in Devon.

The Exeter Heritage Partnership, established in 2018 is an informal network of partners co-ordinating between the principal heritage institutions in the city and championing local heritage.

Historic Partnerships:

The Cultural Compact was formed to sit within the previous Liveable Exeter Board. Exeter Culture was a Cultural Partnership formed in 2018 and was previously called the Exeter Cultural Partnership.

Creative Arc was a programme that was funded through Shared Prosperity Funding, Central Government and was a joint partnership between the University of Exeter and Exeter City Council. A previous iteration of Creative Arc was between the University of Exeter, RAMM and Exeter City Council. It focussed on cultural innovation to shape place. This programme ended in March 2026.

ASSETS

Key cultural assets mapping.

Exeter's rich collection of cultural assets include:

Principal Museum & Art Gallery:

The Royal Albert Memorial Museum (RAMM) is highly regarded as one of the best regional museums in the country. It features four major collection areas: antiquities, art, natural history, and world cultures. RAMM hosts regular exhibitions and has extensive community outreach and learning programmes.

Cultural heritage sites, venues and institutions:

Exeter Cathedral (Cathedral Church of St Peter): One of England's most beautiful medieval cathedrals and a fine example of Decorated Gothic architecture. It boasts the longest uninterrupted vaulted ceiling in the world. It is also home to the Exeter Book, one of the oldest and most significant manuscripts in English literature.

The Devon and Exeter Institution (DEI): A key heritage asset and educational charity. Its collections relate to the history and topography of the West Country dating back to the 16th century. The DEI provides a strong cultural programme, often perceived as an "oasis of calm" and a sanctuary from city life.

Exeter Castle (Rougemont Castle): A Norman fortress built by William the Conqueror in 1068. The ancient gatehouse, walls, and gardens (Northernhay Gardens) are still prominent.

The Ancient City Walls: Originally Roman, but largely developed in the medieval period, significant portions of the defensive wall still encircle the city centre. You can walk along sections of the wall trail.

Exeter's Underground Passages: A unique network of medieval tunnels (not tunnels, but trenches dug and covered over) built in the 14th century to bring fresh drinking water into the city. They are the only historic passages of their kind open to the public in the UK.

The Medieval Exe Bridge Ruins: The remains of a 13th-century stone bridge and the ruins of St. Edmund's Church, located in a park near the Quayside.

St Nicholas Priory: A former Benedictine priory founded in 1087. The building that remains is a Tudor house, restored to show how it would have looked in the 1600s.

Historic Guildhall: Located on the High Street, it is cited as the oldest municipal building in continuous use in England, with its impressive Elizabethan portico dating from the 1590s.

Custom House: The iconic Exeter Custom House on the Quayside is one of Exeter's most photographed hotspots. Renowned for its ornate plaster ceilings dating back to the 17th century, the beautiful building showcases displays, illustrations, and a vibrant events programme that bring the history and culture of Exeter's Quayside to life. The Custom House is part of the Exeter Canal & Quay Trust's portfolio.

The House That Moved: A timber-framed Tudor building from around 1450 that was physically moved in 1961 to make way for a new road. It stands near the Quayside.

Mol's Coffee House: A striking timber-framed house (c. 1596) located prominently in Cathedral Close, noted for its architecture.

Wynard's Almshouses: Historic almshouses originally founded in 1430, forming an attractive group of red sandstone buildings.

ASSETS

Key cultural assets mapping.

Historic Parks and Surroundings

Northernhay Gardens: Established in 1612, this is cited as the oldest public open space in England. It was originally part of the defensive area of Rougemont Castle.

Exeter Historic Quayside & Canal: A historic commercial area that has been a bustling hub since Roman times, featuring the start of the Exeter Ship Canal, which dates back to the 16th century. The Harbour has Heritage Harbour Status.

Performing Arts and Venues:

Exeter Phoenix: A multi-artform venue hosting a wide range of events, including live music, theatre, cinema, contemporary art, comedy, talks, and workshops, and offers training opportunities for artists.

The Exeter Northcott and Barnfield Theatres: The Northcott Theatre supports associate artists, youth companies, and diversity groups. It runs the ELEVATE programme to support South-West artists through free membership, paid employment opportunities, commissions, platforms for new work, and dedicated R&D space.

The Corn Exchange: Large multi-purpose venue, hosts comedy, music, pantomime, conferences, and trade shows.

Cygnet Theatre: Intimate theatre and professional actor training school, presents classical, modern, and new theatre works.

Alibi: Based at Emmanuel Hall in Exeter, this has been reimagined into a Centre for the Imagination and Young People and hosts performances, workshops, live music and immersive experiences. Their Mission is to create playful, safe and inclusive spaces where children can explore their creativity and discover themselves and the world in imaginative ways.

The Great Hall (University of Exeter Steatham campus): Largest indoor venue in Exeter (capacity up to 1,800 standing), hosts major music concerts (like the Bournemouth Symphony Orchestra), comedy, and large-scale events.

The Lemon Grove (University of Exeter Steatham campus): Intimate music venue on the University campus, hosts gigs for up-and-coming and established bands.

Exeter Cathedral: Historic and spectacular setting for classical music concerts (including the Exeter Festival Chorus), exhibitions, and major events.

Westpoint Exeter: Located just outside the city, this is the largest indoor arena/showground in the South West, hosting larger concerts, exhibitions, and large-scale events like Disney on Ice.

St Nicholas Priory: An historic building that can be hired and used as a unique performance space for concerts or plays.

ASSETS

Key cultural assets mapping.

Other Live Music Venues.

Exeter Cavern (The Cavern Club): Legendary small (approx. 220 capacity) independent venue, known for indie, rock, punk, and underground sounds. It has a history of hosting acts like Muse and Coldplay in their early days.

Bomba: A smaller venue hosting regular live bands, club nights, and acoustic shows.

Move: Primarily an underground club venue, but it also hosts live bands and a wide range of electronic music genres (DnB, House, Techno).

The Old Firehouse: A popular pub well-known for hosting live music, particularly on Friday nights.

The Bootlegger: A cocktail bar with a speakeasy atmosphere that prides itself on hosting local talent and regular live music.

Ludo's Exeter: Located in the Guildhall, they host regular live lounge/acoustic music sessions.

Topsham Brewery: Located on the Quayside, it has a venue space that hosts live music and events.

The Stand Off: A bar/venue that brings bands to Exeter, hosting a variety of live music and events.

Artist-Led & Meanwhile Use Spaces.

These spaces are key to the independent and often temporary arts scene, often utilising vacant properties for art programming.

Positive Light Projects (PLP): A dedicated artist-led space that operates with a flexible, independent ethos. It regularly hosts contemporary exhibitions and projects.

Exeter Custom House and Transit Shed: Historical buildings on the Quayside which host a vibrant collection of arts and cultural events. Art Work Exeter and Literature Works are currently Cultural Partners.

Polka Dot Gallery: A smaller, independent gallery often featuring works by local artists, such as contemporary paintings of Exeter.

Paris Street Pop-Ups: Commercial units on Paris Street (near Princesshay) that are often temporarily converted into exhibition spaces during events like Art Week Exeter to showcase independent artists and collaborative projects.

We Are (former Topshop), 11 Eastgate / Unit 5 (former Body Shop), Guildhall Shopping Centre: Examples of vacant retail units in the city centre (Princesshay and Guildhall) that have been recently transformed into pop-up exhibition venues for collaborative projects like Elsewhere(s).

CoLab Atrium (Wat Tyler House): A community venue that hosts exhibitions focused on social themes and collaborative art from local groups and charities (eg: 'This City We Live In' exhibition).

ASSETS

Key cultural assets mapping.

Other Community & Unique Exhibition Spaces (During Art Weeks/Events): Exeter's arts scene frequently extends into non-traditional venues, including Exeter Library, St Martin's Church, St Thomas Library, and various spaces on the University of Exeter Campus (such as The Forum), which act as temporary or minor exhibition sites.

Education: creative and cultural industries.

Exeter College: Includes the Centre for Creative Industries, offering practical courses across art, theatre, music, media and dance.

Exeter University: Boasts strength in areas like Creative Writing, Film, Intellectual Property (IP), and Ethics. The Centre for Intermedia and Creative Technology (CICT) promotes advanced transdisciplinary research in digital technology and creative media. Supporting organisations include Screen Devon, exeFilm, and the Bill Douglas Cinema Museum.

Artist Production & Studio Spaces.

These venues offer dedicated, long-term studio facilities and often run independent programming and open studio events:

EVA Studios (Exeter Visual Arts Studios).
Kaleider Studios.
Positive Light Projects (PLP).
Studio 36.
The Studio, 10 Manston Terrace.

Makerspaces & Prototyping Hubs.

These spaces are focused on digital fabrication, craft, and skills development:

FabLab Devon (at Exeter Library): A digital makerspace offering access to advanced technology, including laser cutters, 3D printers, CNC routers, and digital embroidery machines. They provide workshops, taster sessions, and a membership scheme for makers.

Creative Quadrant (CQ) & The Skydeck (University of Exeter): Versatile, dynamic spaces at the University Business School designed for creative learning, design thinking, and rapid prototyping. While primarily for students and staff, they foster a culture of making and iterative innovation with low-fi prototyping materials and tools.

Creative Co-Working & Hubs.

These venues offer flexible desk space, offices, and event spaces for creative professionals and freelancers:

Exeter Phoenix (Creative Hub).
Generator Hub.

Independent & Vintage Shopping Areas.

Creative retail is heavily concentrated in the following areas of the city centre:

Gandy Street.
Fore Street (West Quarter).
Magdalen Road.
Exeter Quayside.

INFLUENCES

Policy context.

Many pieces of work have gone into the understanding of this moment in the city's story. The last cultural strategy was published before the pandemic and subsequent reports and recommendations have been commissioned and submitted since then.

Key documents we consulted as part of the literature and policy review informing this baseline assessment are set out here and across the next page. In addition to these, Arts Council Audience Agency data and policies have also been referenced. All these original documents can still be accessed and add up to a lot of insights and learning. Together, these formed the foundation of our inquiry and thinking for the new Cultural Strategy.

TITLE	AUTHOR(S)	PUBLICATION
City of Literature		
Feasibility Study For The Growth Of The Literary Industries At The University Of Exeter	Claire Doherty and David Micklem	Mar 25
Exeter City Of Literature Unesco Membership Monitoring Report 2019-2023	Exeter City of Literature	Jun 24
Exeter City of Literature Strategy: 2025 - 2030	Exeter City of Literature	2025
Exeter City of Literature Partnership Manifesto	Exeter City of Literature	2025
Creator Economy		
Voices of the Creator Economy 2025	Kolsquare	2025
Custom House		
Quay to the Future: Roadmap Report	Exeter Custom House	2025
Devon & Exeter Institution		
Next Chapter Report: DEI Evaluation	Diana Moore & Dr Samantha Peters	2025
Devon & Torbay Combined Authority		
The Devon Toolkit	Peter Anderson Studio	Sep 24
A Case for Cities in Local Government Reorganisation and Devolution	Inner Circle	Sep 25
East Devon Culture Strategy		
Culture Strategy 2022 - 2031	East Devon District Council	2022
Exeter City Centre Strategy		
Draft Vision v1	Exeter City Council	Dec 25

INFLUENCES

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Policy context.

TITLE	AUTHOR(S)	PUBLICATION
Cultural and Place Based reports on Exeter		
(Co)Mission – Ways forward for art and culture in planning and urban development in Exeter	Blind Ditch commissioned by Exeter Culture	May 22
An Opportunity in the making: Exeter & its creative place making	Charles Landry	Nov 22
Economic and Social Value of Culture in Exeter	Daria Incarnato & Augustin Lagarde (SIMETRICA Jacobs)	Aug 24
Historic Places Panel Review Paper Exeter	Historic Places Panel (Historic England)	Sep 24
Outdoor Arts in Exeter A Pandemic Compliance Report	Dr Tony Lidington (Promenade Promotions)	May 21
A Public Art Strategy for Exeter	Art Work Exeter (Commissioned by ECC, University of Exeter, and Exeter Culture)	Jul 22
Trade & Exchange: Empty Shop Windows Commission Evaluation Report	N/A (Project team composed of multiple partners)	Nov 21
Exeter a place-based Cultural Strategy 2019–2024	Tom Fleming Creative Consultancy (Commissioned by Exeter Culture et al.)	2019
Corporate Plan 2025–2028	Exeter City Council (Cllr Phil Bialyk and Bindu Arjoon)	2025–2028 (Plan Period)
Local Government Review Draft Submission Report plus appendices	Exeter City Council	Nov 25
Local Plan: The Exeter Plan	Exeter City Council (Publication Plan: Regulation19)	Dec 24
Liveable Exeter		
Vision 2040	Liveable Exeter	Dec 19
Exeter Live Better: Brand Story	Exeter City Council	
Survey 2024	Exeter City Council	Sep 24
Survey 2025	Exeter City Council	Aug 25

TITLE	AUTHOR(S)	PUBLICATION
Liveable Exeter Principles	Exeter City Council	N/A
Liveable Exeter Prospectus: A Transformational Housing Delivery Programme	Exeter City Council (Produced by LDA Design)	Feb 19
Liveable Exeter X Connected Culture	Exeter City Council (Presentation Document)	N/A
Cultural Placemaking Study	Futurecity	Sep 23
Tourism Sector		
Economic Impact of the Exeter Visitor Economy 2023	South West Research Company	Nov 24
Devon & Partners LVEP Growth Plan 2025–26	Devon & Partners LVEP	Sep 25
Devon Tourism Trends 2024 Annual Report	South West Visitor Economy Hub	2025
Visit Britain/Visit England Business Plan 2025-26	Visit Britain/Visit England	2025
BT Active Intelligence footfall data Exeter City Centre	BT Active Intelligence	Nov 25
Creative Industries		
The Creative Industries in the Great South West	Great South West Partnership	2025
InExeter BID		
InExeter Market Summary	Ellie Greaves and Hayley Wagstaff (CACI)	Sep 24
June Boom Exeter 2025 (Review)	N/A (Managed by InExeter, Visit Exeter, Exeter Culture)	2025
InExeter Business Plan 2025–30	InExeter	2025
Libraries		
Libraries Unlimited Impact Report 2024-25	Libraries Unlimited	2025
Northcott Theatre		
Elevate Impact Report 2024/25	Prepared by Sam Parker	Sep 25
Royal Albert Memorial Museum		
RAMM about Town Interim report	Royal Albert Memorial Museum (RAMM)	Jul 22
RAMM Delivery Model Assessment Draft v1	Exeter City Council	2025

INFLUENCES

1

Policy context.

The National Perspective.

Culture and the Creative Industries are central to the Government's national priorities. These can be clustered around three key themes supporting economic growth, community cohesion and creating new opportunities to develop new skills and engage with culture and the arts.

CREDIT: ALMANAC THEATRE, EMILY APPLETON

NATIONAL STRATEGIC PRIORITIES	DRIVING ECONOMIC GROWTH	SUPPORTING COMMUNITY COHESION	CREATING OPPORTUNITIES TO LEARN AND ENGAGE
Department for Culture, Media and Sport	Growth & Good Jobs in Every Place	A More Socially Cohesive Country with an Inclusive National Story	Richer Lives with Choices and Opportunities for All
Creative Industries Sector Plan (2025)	UK established as number one destination for investment in creativity and innovation. Focus on: Accelerating innovation; securing growth finance; resilient and diverse workforce; increasing trade and exports through Creative Industries Cluster Programme.	Ensuring Equality, Diversity and Inclusion is embedded across all aspects of the programme	Skills and Talent Development: Improve access to skills, knowledge and expertise through clearer career pathways.
Arts Council England Strategy (*Lets Create 2020–2030*)	A Creative and Cultural Country: England's cultural sector is innovative, collaborative and international. With a key focus on strengthening Capacity and Resilience of cultural organisations.	Cultural Communities: Villages, towns and cities thrive through a collaborative approach to culture.	Creative People: Everyone can develop and express creativity throughout their life. Key focus on Children and Young People, ensuring access to high-quality cultural experiences and development of their creative potential.
Historic England (Corporate Plan)	Securing positive, sustainable change for historic places.	Better Places: heritage driver to support civic pride, prosperity, wellbeing and opportunity.	Inclusive Opportunities: Promoting greater diversity and inclusion in their workforce and practices, and broadening public engagement with heritage.
National Heritage Lottery Fund: Heritage 2033	Saving Heritage: Protect, repair and revitalise heritage assets		Inclusion, Access and Participation: Supporting greater inclusion, diversity, access, and participation in heritage.
English Devolution (White Paper) 2025	"21st Century Medici model" that sees culture and the creative industries as crucial for generating growth, innovation, and attracting skilled people. Supports the development of Local Growth Plans which include culture, heritage and the visitor economy as key levers for growth.	Recognition that Culture is a key factor increasing Pride in Place and increasing community satisfaction.Tackling disparity: a commitment to significantly increase cultural investment outside of London	Nurture talent pipe-line outside of London and align Local Skills Improvement Plans with Regional Industrial Strategies including focus on addressing skills gaps within the creative industries
Sport England Strategy (2021 – 31)	Major Events: continue to support the UK as the home for major events and inspire the nation	Connecting Communities:Harnessing sport's power to strengthen communities, reduce social isolation, and improve the social fabric of local areas.	Tackling Inequality: increasing engagement in activity among lower socio-economic groups, women and girls, disabled people and ethnic minority communities

INFLUENCES

PEST analysis.

Key factors influencing the context for development and delivery of the Cultural Strategy include:

POLITICAL

- Local Government Review (Elections for the new authorities May 2027)
- Devolution (Devon & Torbay CCA inaugurated March 2025)
- Local Elections (May 2026)
- Local Plan (Examination spring 2026)

ECONOMIC

- International geo-politics
- Cost of Living / inflation
- National economic picture
- Local industry and labour market
- Investment and funding
- Local regeneration plans

SOCIAL

- Local population demographics
- Audience engagement and expectations
- Cultural programming and infrastructure
- Learning and skills development
- Equality and diversity

TECHNOLOGICAL

- Digital access and skills
- Artificial Intelligence (AI) impacts
- Social media and marketing
- Online cultural engagement
- Immersive tech

Exeter City Council

INFLUENCES

Economic context.

Key employers and professions in Exeter include Health and Care (Royal Devon & Exeter Hospital are a major employer), Professional Services (legal and trust fund activities are highly specific to the Exeter area), Knowledge Industries (including the University of Exeter and Met Office), and Digital (telecoms, web portals, data processing, hosting and related activities).

Arts, Entertainment and Recreation accounted for 2,000 Employee Jobs (PAYE) in Exeter in 2024 (2% of jobs in the city, in comparison with 2.3% in the South West and 2.5% in Great Britain).

The primary data sources used for 'Employee Jobs' specifically exclude the self-employed (someone who runs their own business) and people who work in a freelance capacity (typically on short-term, project-based assignments for multiple clients).

As of the third quarter of 2025 there were around 4.39 million self-employed workers in the UK, approximately 13% of the UK workforce, and around 45% of these freelance. The number of 'side-hustles' (part-time freelance businesses) has dramatically increased in the last few years.

The UK Creative Industries see a high proportion of self-employed or freelance workers – estimated at 675,000 – 989,000 roles nationally, representing around 31% of the total creative workforce (compared to 15% self-employment rate in the wider UK economy).

It's hard to accurately state how many people in Exeter are working in a self-employed or freelance capacity as for small geographies (like local authorities) the data is subject to sampling variation and can be unreliable, but data from the Creative Industries Policy and Evidence Centre puts the figure at around 1,000 working self-employed or freelance in the creative industries in the city, bringing the total (PAYE or self-employed) to around 3,000.

Exeter City Centre High Street.

Exeter is consistently ranked as a highly successful retail destination, nationally and regionally, and its pull is growing.

National Dominance: Exeter ranks in the top 1% of UK retail destinations, specifically ranking 32nd out of 4,791 centres (excluding regional malls and retail parks). This places it comparably to cities like Bath and York.

Regional Dominance: Exeter holds an expected retail market share of 32% within its total catchment. The lack of competition within this catchment means Exeter has access to a significant volume of spend.

Market Potential: Exeter has a substantial Comparison Goods Market Potential of £356.7 million and a Total Leisure spend potential of £187 million.

INFLUENCES

Economic context.

High Street audience profile and affluence shift.

Footfall is increasing, driven significantly by more affluent visitors traveling from further away.

Growing Affluence: Footfall from the top three most affluent Acorn groups has increased by 17% (and 1.6 million) since 2019. This affluent visitor base includes "Commuter-Belt Wealth" and "Mature Success".

Visitor Origin: Exeter is increasingly a destination, with visits from over an hour away growing by and 1.7 million since 2019. The average visitor drivetime has increased from 49 minutes to 57 minutes.

User Group Changes (2019–2024): The city saw growth in footfall from Day Trippers (and 24%) and Catchment Residents (and 17%). However, footfall from Workers declined by 25% (-1.3 million).

Retail Mix: The city's retail mix has evolved to become more premium over the last five years, aligning with the growth of affluent visitor groups.

Tourism market size and value.

Exeter's visitor economy volume and value:

Total Economic Value: The estimated total tourism business turnover for Exeter (including staying, day visitor spend, and other tourism-related spend) is £257,862,575.

Total Visitor Spending and Trips (2024 Projected): Total spend from combined day and staying trips was projected to be £193,983,000 in 2024. The total number of combined day and staying trips is projected at 1,813,000. The three-year rolling average spend is £190,150,667.

Employment: Tourism accounts for an estimated 3,332 actual jobs (regardless of full or part-time), representing 5% of all employment in the area.

Average Spend: Day visitors have an average spend per trip of £56.53. UK staying visitors spend an average of £222.12 per trip (or £64.67 per night), while overseas staying visitors spend significantly more, averaging £944.02 per trip (or £70.27 per night).

Staying Visits Breakdown (2024 Projected):
UK staying visitors accounted for 1,051,000 trips and spent £67,970,000.

Overseas staying visitors accounted for 618,000 trips and spent £43,425,000.

INFLUENCES

Economic context.

Previously identified opportunities and recommendations.

1. Revitalise the Evening Economy: Evening footfall has declined across all days of the week since 2019 (ranging from -15% to -22% change). There's significant opportunity to grow the focus on revitalising the evening economy, especially because household spend on Leisure within Exeter's catchment is and 8% higher than the UK average. The recommended approach is to grow the proportion of Catering provision in line with benchmark cities like Bath and York. Working with employers to incentivise workers to socialise post-work is also suggested.

2. Leverage Increasing Affluence: Future city plans should cater to the needs and desires of the growing affluent visitor base. This includes ensuring the city centre offer evolves with the footfall profile.

3. Enable Frictionless Access for Tourism: To continue building regional dominance, the city should facilitate increasing levels of tourism through events, activations, and improved transport and hotel infrastructure.

Local Area Insights.

The Quay: The Quay is resonating with local, affluent groups and is increasing in popularity, with a higher proportion of total city centre footfall in 2024 compared to 2019. Maintaining opportunities to dwell, dine, and exercise should continue to be prioritised.

Winning Competitors: Exeter is successfully winning visits from nearby competitor towns like Newton Abbot and attracting significant visits from Plymouth.

PIC: HERITAGE HARBOUR FESTIVAL, APPLETON EVENT PHOTOGRAPHY

Cultural audiences.

Population demographics

Exeter's population is approximately 130,700 based on the 2021 census, but an additional 40,000 people travel into the city every day to go to work and college/university from the surrounding area. Over 2 million visitors come to Exeter every year. Exeter is less deprived Overall (IMD) than 63% of local authority districts, but still has pockets of deprivation and there are significant differences between some areas in the city. IMD data is published at the LSOA level (small areas of approximately 1,000 people) and is not directly aligned to Council Ward boundaries. Nine LSOAs in Exeter were in the 20% most deprived nationally in the 2019 indices.

Audience demographics

Audiences can be segmented or divided into small, specific groups based on shared characteristics, such as their demographics, behaviour or interests. This particularly helps cultural organisations tailor their programming and marketing to specific groups, maximising engagement and improving conversion rates.

Using Audience Spectrum*, the dominant segment for Exeter and much of its surrounds is the 'Dormitory Dependables' segment, with areas of 'Home and Heritage' to the south west and 'Trips and Treats' to the further south west and north east.

The city centre shows dominant segments of 'Experience Seekers' (EX1 and EX4) and 'Commuterland Culturebuffs' (EX3) in small areas too.

Definition of audience segments.

Dormitory Dependables:
This is a dependably regular, although not high frequency, engagement group. Most live in suburban or small towns and show a preference for heritage activities, popular and more traditional mainstream arts. They're less likely to be attracted by contemporary offerings. They're largely a homogenous group of white, middle-class, well-off, mature older couples or busy older families benefitting from general good health and mobility. Their life stage and more limited access to an extensive cultural offer means culture is more of an occasional treat or family outing than an integral part of their lifestyle.

Home and Heritage:
This is a more mature group, retired or semi-retired home-owners, well-educated and on modest pensions. They are conservative in their tastes and appreciate all things traditional. The National Trust, classical music and amateur dramatics are comparatively popular. They are largely to be found in rural areas and small towns and this means they are less highly engaged although they do engage with cultural activity available to them in their locality. They can be categorised as an extremely homogenous group of White British elders with high instance of widowhood and disability. They are broadly positive about arts and culture, see themselves as arts-attenders and are attracted to daytime activities and historical content, as long as their access needs are met.

*Audience spectrum is a geo-demographic profiling and targeting tool that segments the UK population by their attitudes towards culture.

Cultural audiences.

Trips and Treats:
This group has a strong preference for mainstream arts and popular culture like musicals, familiar drama, days out to museums and heritage sites. They're strongly led by their children's interests and influenced by family and friends. Engagement in arts and culture is largely determined by children's interests, educational requirements, value for money and the need to guarantee good family fun. They are particularly busy with a wide range of leisure interests. They're generally living in the heart of suburbia, their children range in age and include young people still living at home. They are comfortably well-off but a mortgage and supporting a family mean higher outgoings and pressure on finances, so they look for a good deal and low cost activities.

People in this segment are the keenest shoppers and they enjoy eating out with friends at well known chain restaurants and in-house entertainment.

Experience Seekers:
This segment are an important and significant part of urban arts audiences. Living close to city centres, they have easy access to and attend a wide variety of arts, museums, galleries and heritage. They are highly active, younger singles or couples, young-professionals, mid-career or career-minded graduates. Frequent and eclectic arts engagers, interests cover mainstream, contemporary and culturally diverse offers. Attending is at the heart of their social lives. They're mostly in search of new things to do and have disposable income to spend on a variety of leisure activities.

A digitally savvy audience, this group incorporates a wide range of ethnicities, age brackets and lifestyles. It reflects the ethnic diversity of the country's urban population with a higher proportion than average of non-British white people, and those of African or Indian backgrounds, as well as Turkish, Chinese and East Asian heritage. There is a low incidence of long-standing or limiting disabilities in this group.

Commuterland Culturebuffs:
This group is affluent and settled - mature families (often empty-nesters) or retirees, living in provincial or greenbelt comfort. Their habits are perhaps influenced by commuting and they tend to have a higher level of education. They are keen consumers of culture, with broad tastes but a leaning towards heritage and more classical offerings. They are frequent attenders but time-poor so look for guaranteed high-quality experiences. They are willing to pay for premium experiences and have considerable disposable income, paying for secondary spend and donating generously. Arts and culture form an integral part of this group's social lives so a good atmosphere for spending time with friends and family is essential.

Their motivations are multiple, ranging from social and self-improvement to the pursuit of learning opportunities for older children. Ensuring good quality artistic experiences and maximising opportunities for in-depth engagement will help build relationships with arts providers. They generally enjoy good health although 24% have a disability or long-term illness with access requirements tending to be age-related.

TRENDS

Creative Industries Sector Trends.

The creative industries contributed around £124 billion to the economy in 2023 – around 5% of total UK economic output, and sustained 2.4 million jobs in the year from July 2023 to June 2024 (7% of all UK jobs). The South West's Economic Output in this sector (2022) was £5.25 billion (gross value added), sustaining 180,000 jobs (July 2023–June 2024).

1. The Creative Industries are growing faster than the wider UK economy.

Despite economic pressures, the creative industries remain one of the UK's highest-growth sectors.

Key trend: Forecast growth: £50bn GVA increase and and 1 million new jobs by 2030 (DCMS Creative Industries Sector Vision).
Strongest growth areas: film/TV production, gaming, immersive media, digital creative tech, design, advertising, and creator economy roles.

2. Creative employment is concentrating around key regional clusters.

While London remains dominant, growth is faster outside London in regions with clear creative hubs.

Current high-growth clusters:
South West: Bristol and Bath for film/TV, design, games, SW generally emerging in digital and creative tech.
South East: Brighton for games, digital marketing, and immersive tech.
North West: Manchester/ Salford "Media City" and Liverpool for film/ and-TV, music, advertising.
Yorkshire: Leeds and Sheffield (screen industries, design, digital).
Scotland: Glasgow and Edinburgh (games, film, festivals, publishing).

As of early 2026, Exeter University is currently leading on a new Creative Cluster bid to attract investment to Exeter and other South and South West coastal towns and cities.

3. The strongest job growth is in digital creative roles.

The big expansion area is jobs blending creativity with technology.

High-growth roles:
Games design & development.
XR/immersive (VR/AR/MR) designers.
Digital content creation (especially short-form video).
UX/UI and service design.
Motion graphics & digital 3D.
Creative data roles (e.g., audience insights, behavioural design).
Audio production & podcasting.
Social media and digital marketing.

TRENDS

Creative Industries Sector Trends.

4. Film & TV production remains a powerhouse – but skills shortages are chronic.

The UK's screen industries are growing rapidly due to:

International studio investment.
Streaming demand.
Government tax incentives.
Regional studio infrastructure (Bristol, Cardiff, Belfast, Leeds, Manchester).

Current trends:
High demand for production crews, technical roles, post-production, costume, VFX and location teams.
Severe skills shortages reported by ScreenSkills.
Screen Devon has identified Exeter as a potential high value location for filming due to its heritage environment. This is currently under-exploited.

5. Games and immersive media are growing faster than any other UK creative sector.

The UK games industry has seen consistent double-digit growth and is now larger than film and recorded music combined.

Growth drivers:
Strong UK studios (eg: Creative Assembly, Playground, Supermassive, Ubisoft Reflections).
Explosion in mobile, esports and online multiplayer.
Cross-over with film/TV (virtual production).

6. Freelancing and portfolio careers are now the dominant employment model.

Across design, screen, marketing, music and performing arts, freelance work continues to grow.

Trends:
30–60% of the workforce in some creative subsectors is freelance.
Freelancers need multi-disciplinary skills, digital visibility, and business resilience.
Growing need for coworking and networked creative spaces in regional cities.

Implication: Cities that provide stable creative ecosystems, training and networks benefit from attracting and retaining talent.

TRENDS

Creative Industries Sector Trends.

7. Roles that fuse STEM and Creative are rapidly increasing.

STEAM – Science, Technology, Engineering, Arts and Mathematics – is a significant trend. Fusion growth areas include:

Creative AI roles (prompting, generative design, AI-assisted editing).
Creative coding and computational design.
Interactive storytelling.
Data-driven decision-making in creative agencies.
Virtual production using real-time engines (Unreal/Unity).

8. Employer demand is shifting toward soft skills and adaptability.

Employers increasingly want skills which are developed in creative industries courses and workplaces. These skills are portable and valued across all sectors:
Collaboration.
Problem-solving.
Communication.
Strategic thinking.
Resilience.
Multi-disciplinary creativity.

9. Regional cities with universities and digital infrastructure are seeing rapid creative growth.

Cities like Exeter, Bristol, Leeds, Nottingham, Glasgow are benefitting from:
University-industry partnerships.
Anchor cultural organisations.
Improved connectivity.
Tech/knowledge economy clusters.
Affordable (or more affordable) living compared to London.

10. The "Creator Economy" boom is reshaping entry-level pathways.

Younger creatives increasingly enter via:
YouTube, Twitch, TikTok.
Indie game creation.
Self-publishing.
Podcasting.
Micro-agency work.
Content studios.
E-commerce and design hybrids.

Implication: Traditional pathways (internships, apprenticeships, London-based roles) are no longer the only route.

TRENDS

Creative Industries Sector Trends.

Implications for Exeter.

The creative industries are growing, particularly outside London and especially in areas blending creativity with digital and tech. The workforce is geographically mobile and quality of life is a strong motivation for freelancers who make up a large proportion of the self-employed labour market. The sector trends - general overall growth, expanding job pathways, demand for creative-tech skills, creation of clusters, alignment with universities - along with Exeter's strengths - an expanding digital sector (data, climate tech, health tech), high quality of life, proximity to existing South West screen and tech ecosystems in places like Bristol - see huge opportunities at this specific point in time for the city to grow its creative industries sector. Cities that can build on existing infrastructure and provide stable creative ecosystems, training or non-traditional pathways into creative careers, and strong networks for a freelance workforce will attract and retain talent and see a surge in the development of their creative industries sector.

Arts and Cultural related funding trends:

1. Long-term, place-based investment (not just standalone projects).
Fewer "one-off, stand-alone" grants are available and there is much more emphasis on multi-year, place-focused programmes that tie culture/ heritage to regeneration, local identity, and levelling up. Place-based investment with multi-layered impacts and benefits over longer time periods are available and are designed to get organisations working at scale.

2. Equity, inclusion and social justice are front-and-centre.
Funders increasingly expect explicit social-justice outcomes: who benefits, who has power, how marginalised communities are involved in design and decision-making, and how structural barriers are challenged. Inclusion and relevance, tackling inequalities, supporting places and communities to thrive and improving our natural world are all major trends.

3. Environment, nature and climate as cross-cutting priorities.
Almost every major funder now expects projects to engage with environmental responsibility, whether through direct nature work, sustainable practice, or the climate implications of capital projects and touring. Sustainability in some form can be seen as a major investment pillar for many of the major cultural funders.

4. More flexible, long-term and core funding (for some).
At the "big" end, funders are willing to back organisations with multi-year and sometimes unrestricted funding – but usually only where they see strategic relevance, strong governance, and a clear role in wider systems change. Funders are looking for long-term outcomes, systems change and organisational resilience rather than short term projects.

5. Partnership, collaboration and cross-sector work are almost mandatory.
Big awards increasingly go to coalitions (council and culture/ heritage and community and sometimes health, education or environment), not solo organisations. Major funders are looking to strengthen partnerships in the culture and heritage sectors with external partners like government, local authorities, BIDs and statutory agencies.

Creative Industries Sector Trends.

6. Stronger expectations around data, learning and evidencing impact.
Funders have detailed frameworks for assessing impact and performance. Applications need clear theories of change, measurable outcomes, and a plan for learning and sharing, not just "we'll do an evaluation at the end".

7. Focus on children, young people and inter-gen work.
Multiple-funders cite the importance of making a difference for children and young people so demonstrating deep, meaningful engagement with this demographic - especially children and young people facing barriers – will align with funder priorities.

8. Heritage funding: from "buildings only" to people, place and high streets.
A narrow focus on 'heritage assets' has shifted to a broader framing of heritage and the context it sits in, particularly looking at wider impacts on communities, economic growth and pride in place. Heritage funders want heritage and people and economy and culture, especially in town centres and high streets – and they are very open to cultural organisations leading or partnering in that work.

9. Funding remains tight and competitive – diversification is expected.
Funders expect organisations to show diversified income, earned revenue where feasible, and realistic plans for sustainability beyond the grant. Many local authorities are cutting discretionary culture budgets, pushing organisations to rely more on lottery, trusts and foundations so competition is fierce and success rates are low due to the increased number of applicants.

10. Growing interest in blended finance and social investment.
Over time, expect more hybrid offers – a mix of grants, social investment, and capacity-building – especially for organisations with scalable or income-generating models.

Culture and Health & Wellbeing.

Over the past five years, cultural activity has moved from being seen as a soft, complementary service to being a formal component of public health and NHS frameworks – it's now becoming a mainstream health intervention:

WHO's global review shows strong evidence that arts participation improves mental health, supports rehabilitation and reduces loneliness.

In England, the NHS Long Term Plan and National Academy for Social Prescribing (NASP) explicitly include arts, libraries, museums, heritage and creativity in their pathways. "Social prescribing" is now embedded in all Primary Care Networks, accelerating demand for cultural partners.

Cultural organisations are being asked to become health delivery partners, not simply run 'health-themed' projects, with mental health and loneliness being the two biggest focus areas. Funders increasingly prioritise isolation, loneliness, youth mental health and older people's wellbeing and cultural prescribing programmes focus on things like choirs, making, nature walks, journalling and reading groups to help with emotional regulation, confidence, belonging and social connection.

Culture's biggest "health" contribution is now understood to be connection and meaning and expression, not simply activity.

TRENDS

Creative Industries Sector Trends.

1. "Everyday creativity" and accessible, informal participation are in high demand where programming is social, tactile, expressive and easy to access locally. The strongest growth is in low-barrier, non-elite, non-artform-specific activity like craft, making, gardening, textiles, photography, choirs, dance-for-wellbeing, journalling, creative writing, heritage exploration. Activities are being delivered in libraries, parks, community hubs, allotments, hospitals and non-arts spaces.

2. Nature and culture = a rapidly expanding area. There is major growth in funded projects connecting creativity with greenspace, walking, heritage landscapes and nature-based wellbeing, with culture being positioned as a key tool in climate wellbeing, green recovery and active health. There's strong evidence that combining cultural engagement with nature multiplies the wellbeing impact. Funders (NLHF, Natural England, Esmée, NASP) increasingly focus on "nature connectedness" and outdoor cultural experiences. Areas of growth for activity are heritage walks and storytelling trails, outdoor performances, nature journalling, creative ecology/ social ecology projects, art interventions in parks, riverside and coastal areas.

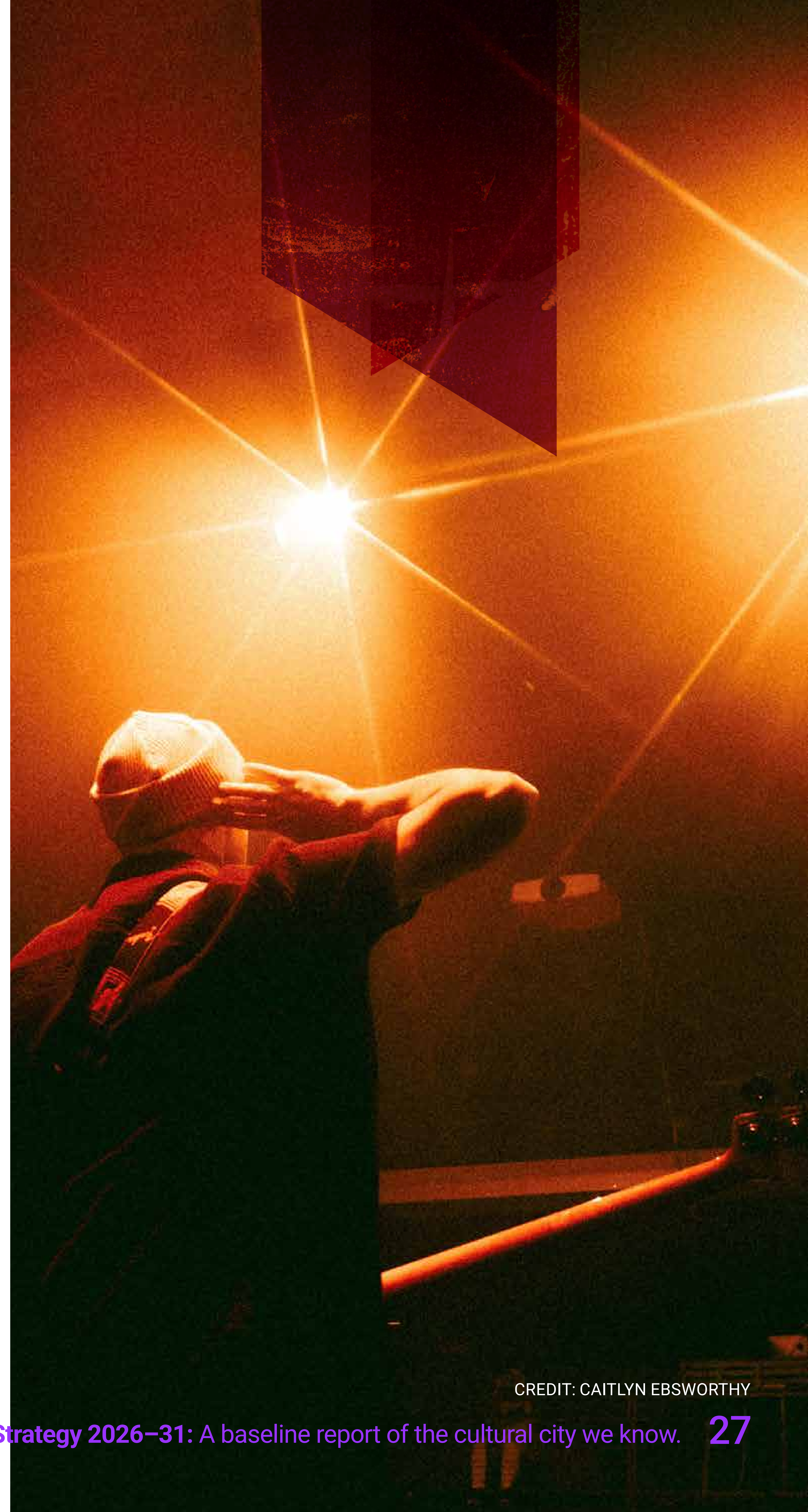
3. There is a move toward prevention rather than specialist interventions – health policy is shifting resources toward prevention, community resilience, and early intervention:

Culture is recognised as a low-cost, high-impact form of preventative health support.

Programmes for young people, families, and older adults are particularly valued.

Commissioners want scalable, persistent, lightly supported cultural activity — not one-off, highly technical programmes. Cultural organisations that frame their work as prevention and wellbeing and resilience align perfectly with health sector priorities.

4. Culture is now being seen as part of "place-based health". Integrated Care Systems are increasingly framing health in terms of place, not individual services, and culture fits naturally into this context too.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TRENDS

Creative Industries Sector Trends.

5. The rise of "Creative Health" is now a national policy movement. Evidence shows the UK is now positioning itself as a global leader in Creative Health and we can expect growing investment, clearer commissioning routes with more opportunities for cultural organisations to lead:

6. A significant trend is seeing more funding flowing through health routes than arts routes with:

• Social prescribing budgets, community health funds, mental health innovation funding, loneliness funds and local wellbeing budgets becoming major cultural funders.

• Many culture–health projects are now funded by health, not Arts Council England.

• ACE's new place-based model further encourages culture-health integration.

• This means cultural organisations need to speak the language of outcomes, evidence, health inequalities, prevention and wellbeing, not just creativity.

7.There is strong emphasis on measuring impact and evaluation expectations. Funders expect robust, ethical, evidence-led evaluation:

Commissioners want clear outcomes: loneliness reduced, confidence increased, mental wellbeing improved, physical activity increased.

There is demand for mixed-method evaluation: wellbeing scales, journalling, case studies, before/ after measures.

We see a growth of Creative Health frameworks like the Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS), ONS wellbeing measures, Social Value measurement and Trauma-informed evaluation.

CREDIT: EXETER CATHEDRAL

FUNDING

Arts Funding.

We have undertaken comparator analysis between Exeter and other UNESCO Cities of Literature, such as Nottingham and Norwich. We've also compared with similar sized cities undergoing Local Government Review – these include: Oxford, Cambridge, Ipswich, Peterborough, Lincoln, Gloucester, Swindon and Reading.

We have based our analysis on Arts Council England (ACE) data, drawn from their Culture and Place Data Explorer website.

In the table here we compare the total amounts of Arts Council England (ACE) funding awarded annually over the last seven years to each of the comparison cities together with the total amount awarded across England. Highlights include:

- total Arts Council funding for England increased by 22%.
- Exeter's funding decreased by 16% from £2,138,935 to £1,788,708 during the period.
- Gloucester, Reading, Swindon and Lincoln, who received less ACE funding at the start of the period, now annually receive more.
- cities located closest to Exeter has seen steeper % decreases in funding than Exeter, indicating the whole sub-region has lost out during the period. Never-the-less, Plymouth still receives three times more ACE funding than Exeter.

City	2024/25	2023/24	2022/23	2021/22	2020/21	2019/20	2018/19	Increase/ decrease
Gloucester	£3,686,261	£2,517,311	£1,131,970	£2,568,479	£1,478,445	£1,140,041	£997,756	269%
Reading	£3,017,895	£2,577,840	£2,390,561	£2,767,396	£5,232,287	£2,085,580	£1,582,537	91%
Swindon	£1,869,034	£1,656,207	£2,783,389	£6,060,984	£1,963,269	£1,272,366	£1,044,338	79%
Norwich	£9,631,337	£6,290,399	£8,095,680	£7,973,351	£12,910,768	£6,900,390	£6,140,104	57%
Nottingham	£12,369,372	£11,189,734	£9,511,461	£12,289,037	£17,573,424	£10,474,762	£8,077,331	53%
Lincoln	£2,557,608	£2,152,940	£1,739,904	£1,833,732	£4,001,898	£1,855,357	£1,840,792	39%
Bristol, City of	£14,586,606	£13,942,988	£12,977,321	£28,470,816	£36,588,687	£13,266,192	£11,200,206	30%
England (Total)	**£790,164,986**	**£790,855,476**	**£737,749,835**	**£892,270,563**	**£1,438,930,191**	**£695,243,250**	**£649,703,687**	**22%**
Peterborough	£1,052,839	£1,967,740	£1,020,569	£3,447,772	£4,348,186	£689,155	£877,637	20%
Oxford	£5,541,191	£5,776,716	£5,528,369	£5,879,395	£10,225,821	£5,009,981	£4,635,412	20%
Ipswich	£3,786,041	£4,740,486	£5,060,957	£4,417,964	£6,111,283	£4,608,352	£4,343,125	-13%
Exeter	£1,788,708	£1,953,670	£3,320,436	£3,304,504	£4,341,045	£2,315,096	£2,138,935	-16%
Bath and North East Somerset	£659,482	£1,202,227	£1,150,434	£2,272,719	£4,828,069	£816,898	£855,809	-23%
Cambridge	£2,643,862	£2,960,866	£3,753,020	£5,236,481	£8,710,240	£3,843,554	£3,949,660	-33%
Plymouth	£5,560,624	£4,947,602	£7,854,268	£5,984,083	£12,158,655	£6,552,763	£10,169,906	-45%

FUNDING

Arts Funding.

Arts Council Funding Per Head of Population – highlights show that:

- Exeter receives below England average ACE funding per head of population.
- similar sized cities such as Gloucester and Ipswich receive more than double Exeter's funding per head of population.

By contrast, Exeter City Council has maintained a high level of cultural investment as a proportion of the overall city's budget.

CREDIT: PHOENIX ARTS CENTRE, KRIS SUM

City	Population (Census 2021)	Arts Council Funding (2024/25)	Funding Per Head (2024/25)
Norwich	143,922	**£9,631,337**	£65.44
Nottingham	323,631	**£12,369,372**	£38.22
Oxford	162,041	**£5,541,191**	£33.37
Bristol, City of	472,465	**£14,586,606**	£29.50
Ipswich	139,642	**£3,786,041**	£26.99
Gloucester	132,416	**£3,686,261**	£26.60
Lincoln	103,813	**£2,557,608**	£24.33
Plymouth	264,695	**£5,560,624**	£20.44
Cambridge	145,674	**£2,643,862**	£17.70
Reading	174,224	**£3,017,895**	£16.50
England (Average)	58,620,101	**£790,164,986**	£13,48
Exeter	130,709	**£1,788,708**	£12.92
Swindon	233,411	**£1,869,034**	£8.01
Peterborough	215,673	**£1,052,839**	£4.71
Bath and North East Somerset	193,409	**£659,482**	£3.30

FUNDING

Arts Funding.

National Heritage Lottery Funding with initial decision between April 2013 and October 2023:

City	NLHF Funding per 1,000 Population
Lincoln	£188,114.33
Bath and North East Somerset	£185,809.59
Norwich	£164,340.13
Ipswich	£158,887.48
Exeter	£156,775.34
Gloucester	£108,319.85
Nottingham	£90,290.29
Bristol, City of	£77,566.21
Oxford	£55,229.24
Cambridge	£54,821.40
Peterborough	£51,981.19
Reading	£24,865.71
Swindon	£19,383.18

Size of the Creative and Cultural Economy:

City	Total Registered Businesses (All Sectors)	Creative and Cultural Sector Businesses	
Bristol	22,020	1,750	8%
Bath and North East Somerset	9,635	750	8%
Cambridge	6,720	505	8%
Oxford	6,325	440	7%
Norwich	6,475	315	5%
Reading	8,195	325	4%
Exeter	5,910	215	4%
Nottingham	12,075	360	3%
Lincoln	3,730	90	2%
Swindon	8,695	205	2%
Ipswich	5,830	135	2%
Peterborough	9,540	220	2%
Plymouth	8,110	155	2%
Gloucester	4,845	85	2%

FUNDING

Arts Funding.

Cultural Participation

The cultural participation figures below are based on the Department for Culture, Media and Sport (DCMS) and Arts Council England (ACE) Participation Survey, reflecting adult engagement observed between May 2023 and March 2024. The figures represent the proportion of adults aged 16 years and over who engaged with these sectors in the previous 12 months.

Cultural Participation and Engagement Levels (May 2023 – Mar 2024). Highlights:

• **Arts Engagement (In Person):** Exeter shows a very high rate of physical arts engagement at 94.37%, significantly higher than the England average of 90.42%. While high, it falls slightly behind Bath and North East Somerset (95.57%). Conversely, its physical participation is considerably higher than cities like Nottingham (85.68%) and Swindon (86.11%).

• **Digital Heritage Engagement:** Exeter reports the highest proportion of digital heritage engagement among all listed cities at 35.05%. This is substantially above the England average of 24.72% and significantly higher than local competitors like Plymouth (22.48%) and Gloucester (18.93%).

• **Library Engagement (Physical and Digital):** Exeter has some of the highest library engagement figures:
In-Person Library Visits (31.80%) is well above the England average (24.99%) and is exceeded only by Cambridge (36.01%) and Oxford (34.64%).
Online Library Engagement (20.12%) is also much higher than the national average (14.33%).
Museum and Gallery Visits: Exeter's in-person museum or gallery attendance (49.06%) is higher than the England average (43.13%). However, it is surpassed significantly by university cities like Cambridge (74.04%) and Oxford (61.34%), suggesting its rate is strong but not top-tier compared to historical and academic centres.

• **Digital Arts Engagement:** Exeter's engagement with the arts online (36.44%) is almost exactly aligned with the England average (36.43%), placing it mid-range when compared to other cities like Cambridge (43.01%) or Bristol (39.67%).

CREDIT: LAURA LOFT BIG SILLY, BLOOM FESTIVAL, EMILY APPLETON

FUNDING

Arts Funding.

Projected growth in demand for cultural services:

Here we compare Exeter and the other cities for projected population growth over the next 15 years, based on ONS projections.

Projected Population Growth (2025–2040)

Highlights:

• Strong Growth Relative to Peers: Exeter's projected growth rate of 6.50% is considerably higher than the rates projected for Lincoln (2.29%), Plymouth (2.20%), Reading (1.24%), and Cambridge (0.97%).

• Contrasts with Declining Cities: Exeter contrasts sharply with the two cities projected to experience population decline over the 15-year period: Oxford (projected to decrease by -2.11%) and Ipswich(projected to decrease by -0.33%).

• Growth Below Top Performers: While robust, Exeter's growth rate (6.50%) falls below the highest projected growth rates seen in this group, notably in Bath and North East Somerset (and8.57%), Bristol, City of (and8.42%), and Peterborough (and7.59%).

• Geographic Context (South West): Compared to its regional comparators listed, Exeter's projected growth (6.50%) is higher than Plymouth (2.20%) and Gloucester (5.94%), but lower than Bristol, City of (8.42%) and Bath and North East Somerset (8.57%).

• Population Size: Exeter remains one of the smaller cities in the set, with a projected population in 2040 (144,708) which is comparable in size to Gloucester (141,071), and slightly smaller than Norwich (151,430) and Oxford (146,233), even though those two cities project lower or negative growth rates.

CREDIT: EXETER PHOENIX, JORBEIN PHOTOGRAPHY

BENCHMARKS

The essential strengths and weaknesses.

Strengths

Thriving city: youthful demographics, fast growing (6.5% growth by 2030); top 1% performing retail; higher than average spend on leisure; growing affluence; high resident satisfaction.

Strong development investment potential.

Strong cultural heritage.

5 NPOs with strong innovation, reputation for excellence and talent nurturing programmes.

Growing creative practice eco-system.

High levels of in person arts engagement 94.37%.

Advanced research in creative digital media and innovation and collaboration across sport and culture.

UNESCO City of Literature with international reach.

Exeter College and Exeter University.

Weaknesses

Confidence and identity around culture.

Arts Council funding in Exeter decreased 16% since 2018, down to £12.92 per head compared with England average increase by 22% to £13,48 per head… and trailing cities like Norwich securing £65.44 per head.

Need for clear new vision and ambition for culture.

Disconnection from culture for many in the community and physical disconnection of spaces and personal safety in the evenings.

Creative industries and arts eco-system: fragile and lacking density and co-ordination with few large firms to anchor a creative cluster.

No significant film / tv production or promotion.

Low talent / graduate retention.

Limited funding and access to commissions.

Limited opportunities to sustain a creative career.

BENCHMARKS

The essential strengths and weaknesses.

Opportunities.

Local Government Review / Devolution.

Clear leadership and ambition from the Council and the sector.

Leverage the Active City ambition and partnership with Sport England to support Wellbeing Exeter.

NPOs, University, Cathedral and College working more strategically, with leadership in the service of the city.

Active programming and marketing of night time and tea-time slots to extend cultural engagement with the city centre, potentially through a fringe festival programme.

Embed cultural strategy and policy into Planning and establish an Urban Room for creative engagement with the community.

Explore community wealth building models.

Active strategies to utilise vacant spaces and meanwhile uses for cultural and community building.

Reframe heritage as part of the city's future and embrace innovation, eg: digital mapping.

Establish creative cluster and creative enterprise zone.

Leverage international exchange programming.

Extend Wellbeing Exeter into collaborative approach to cultural prescribing, leveraging the Active City ambition to support the cultural offer.

Leverage Exeter's global leadership in climate science as unique cultural asset to leverage placemaking and community engagement.

Leverage economic and creative potential for Exeter as a film friendly city.

Threats.

City flies under the radar with Sustainability and growth of cultural sector heavily constrained by funding challenges and organisational capacity.

Climate threats to heritage.

Uncertainties around devolution and LGR holding back investment.

Uncertain economic environment.

BENCHMARKS

Bench marking Exemplars.

Cities that are most often seen as comparable to Exeter tend to share some combination of:

- mid-sized population (100k–200k).
- strong university influence.
- historic city centre with cathedral/heritage assets.
- regional hub status without being a major metropolitan city access to countryside/ coast.
- growing knowledge, tech, or creative sectors.

Based on this, cities commonly compared with Exeter include:

Bath
- Similar mix of heritage, tourism, and a strong university presence.
- Comparable cultural economy and "beautiful small city" feel.

Canterbury
- Cathedral city, major heritage assets, high student population.
- Plays a regional role without metropolitan scale.

Norwich
- Another historic regional capital with a notable arts, literature, and creative-tech scene.
- Slightly larger, but with similar cultural profile and travel limitations.

York
- Cathedral city, university-driven, strong cultural tourism.
- Larger visitor economy but similar "historic compact city" structure.

Winchester
- Smaller, but comparable in historic character, affluence levels, and strong cultural institutions.

Among these peers, Exeter stands out for:
- its dual identity as a Cathedral City and a regional capital for Devon.
- the proximity of both coast and national parks (Exmoor, Dartmoor).
- having a growing innovation corridor (Science Park, Met Office, data/renewables clusters).
- its role as a transport gateway to the South West.

CREDIT: ALEX TOZE

Bench marking Exemplars.

Benchmarking summary:

A. Overall Positioning
Exeter sits in a UK category commonly described as “historic, high-quality, mid-sized regional capitals”. Its closest matches in structure and cultural identity are Bath, Canterbury, and Norwich. York is a bigger and more tourism-heavy analogue, while Winchester and Cheltenham are smaller but culturally aspirational peers.

B. Cultural Identity & Offer
Where Exeter is strong:

It has a distinctive blend of heritage and contemporary culture anchored by the Cathedral and RAMM.

A growing but still under-recognised experiential and festival offer.

Strong outdoor-culture crossover (coast, moors, cycling, walking), which few peers can match.

Comparisons:
Bath and York have more internationally recognised heritage assets and larger visitor economies.

Norwich has a stronger literature and independent arts reputation (UEA creative writing legacy).

Canterbury has cathedral scale and narrative but less diversified creative output.

Where Exeter has headroom:
Opportunity to build clearer thematic identities (eg: climate, data, wellbeing, regional heritage) and strengthen its cultural and place identity.

C. Creative & Knowledge Economy
Exeter’s emerging strength is the alignment of culture with innovation sectors including climate science, data & digital, environmental futures, health & wellbeing, outdoor/adventure industries. This mirrors Norwich (digital/creative cluster) and Cheltenham (cyber-tech & festivals), but Exeter can differentiate by pairing tech with place-based environmental identity (Dartmoor, Exe Estuary, Net Zero initiatives).

D. Talent & University Influence
Exeter’s University brand is high-prestige and internationally recognised, comparable to UEA (for creative writing/literature), Bath (for STEM) and Canterbury (for student presence and city economy). This gives Exeter a strong talent pipeline, but the city still loses graduates to Bristol, London, and Cardiff. Comparable cities have addressed this by strengthening:

- cultural quarter development.
- city-centre creative workspaces.
- nightlife and independent culture.
- post-study economic pathways.

Exeter’s strategy can learn from Norwich (Lanes) and York (creative workspace and visitor economy blend).

BENCHMARKS

Bench marking Exemplars.

E. Tourism & Place Marketing
Exeter's visitor economy is improving but not yet on the level of Bath, York or Canterbury, which benefit from stronger "bucket list" heritage status, larger tourism infrastructure and more established festival brands. Exeter's competitive advantages include:

- outdoor gateway positioning (coast and national parks).
- food, drink, and independent scene that is maturing.
- strong potential for narrative storytelling (Roman city, river, craft, environment).

Ambitious benchmarking

If Exeter wants to go beyond its natural comparators there are key best-practice themes relevant for cultural strategy, place-making, economic development and governance that it could adapt and adopt from larger, leading UK and international cities.

1. Bristol — Creativity, Night-time Economy, Placemaking.
Bristol is the closest major city to Exeter with a strong independent culture and innovation pipeline. Exeter has an independent cultural scene which could benefit from investment and development, and a night-time economy offer which needs recognising, maximising and championing. There is an emerging street art scene which could be developed to build neighbourhood identity. Key areas of learning from Bristol include:

- independent culture ecosystem development.
- music-friendly city policy, night-time economy support structures.
- placemaking through street art & creative identity.
- community-led neighbourhood culture models.
- sustainability narrative aligned with culture.

2. Brighton & Hove — Cultural Tourism, Festivals, Identity.
Brighton is excellent at branding itself around creativity, inclusivity, and culture. Key areas of learning include:

- city-wide festival strategy (Brighton Festival, Fringe, arts calendar).
- positioning as a cultural coastal city.
- visitor economy linked to culture and nightlife.
- strong LGBTQand cultural inclusion model.

3. Oxford & Cambridge — Research, Innovation & Culture Integration
Oxford and Cambridge both exemplify a world-class integration of the knowledge economy and culture/ heritage. Key learnings are:

- bridging science/ innovation with public cultural programmes.
- high-impact museum and gallery models.
- culture as part of talent retention.
- developing globally recognised cultural brands.

Bench marking Exemplars.

4. Nottingham — Sustainability, Creative Industries, Approachability.
Nottingham has developed a strong "green city" and creative economy narrative which Exeter could adopt, including the development of cultural hubs or creative quarters. Key learnings are:

- Net Zero city governance frameworks.
- combined culture and sustainability story.
- creative Quarter model (workspace, start-ups, makerspaces).

5. Leeds — Cultural Cohesion, Investment, City-wide Programming.
Leeds 2023 created a city-wide cultural movement without being a Capital of Culture. Key learnings include:

- mobilising neighbourhood culture.
- large-scale cultural participation programmes.
- governance for cross-city cultural delivery.
- cultural volunteering at scale.

6. Manchester — Cultural Infrastructure and Strategic Leadership.
Manchester can be seen as the current UK leader for bold cultural investment (Factory International/ Aviva Studios) and strong leadership with culture at the heart of strategy, recognised as a driver for inward investment and a key part of long-term planning. Key learnings include:

- long-term cultural infrastructure planning.
- how to leverage culture for inward investment.
- regional leadership and partnership models.
- building internationally significant institutions in mid-sized cities.

7. Glasgow — Creativity and Social Impact
Glasgow is a pioneer of culture-led regeneration with strong grassroots networks. Exeter can adopt key learnings based on:

- community arts and social impact models.
- long-term legacy of being European City of Culture.
- culture as part of wellbeing and tackling inequalities.
- music city governance.

BENCHMARKS

Bench marking Exemplars.

International benchmarking examples.

Looking further afield and thinking about adapting practices rather than adopting them, Exeter could look to a range of international cities for inspiration:

Copenhagen – Culture x Sustainability x Liveability.
This city integrates arts, public space, design and environment in a place which is also world-leading in its outdoor urban culture, with clean, green infrastructure tied to cultural identity.

Utrecht – mid-sized City Excellence.
This city has innovative leadership and exceptional use of its waterways and green corridors, linking its cultural programming to mobility (bike festivals, street culture).

Freiburg – climate leadership x community culture.
Freiburg sees culture woven into sustainability and wellbeing agendas and is looking at the development of carbon-neutral districts (Vauban).

Ghent – independent culture, food and night-time economy
This city has a strong identity built around contemporary culture and a Europe-leading approach to night mayor governance. It has a focus on empowering independent venues and grassroots arts.

Portland (Oregon) - brand identity x Indie culture x place narrative.
Look to Portland for a city which positions itself around craft, creativity and environment. It has a strong indie and makers movement with distinctive storytelling and city brand coherence.

Bench marking Exemplars.

Takeaways for Exeter to adopt.

1. Build a Strong, Distinctive Cultural Identity and Place Narrative.
Inspired by Bristol, Brighton, Glasgow, Portland:

Amplify its independent culture with targeted support.

Use public art, street culture and storytelling to build identity.

Strengthen night-time economy strategy and governance with the introduction of a Night Czar, creating a structured approach to protecting music venues, improving late-night safety, and supporting independent hospitality.

Create a clear and confident narrative that ties together heritage, environment, independent culture, innovation and invitation, and using tools including city brand guidelines, public storytelling campaigns, shared assets across partners and creative commissions to express the Exeter character.

2. Link Culture and Innovation and Environment
Inspired by Oxford, Cambridge, Nottingham, Copenhagen, Freiburg:

Position Exeter as having a unique identity as a global leader in climate and culture.

Create science-arts residencies with Met Office and University.

Develop public programmes around environmental futures with art commissioning based on climate futures and collaborations with the Met Office and University.

Host outdoor exhibitions on climate resilience and create a sustainable events framework for the city.

3. Launch a City-wide Festival/Participation Model
Inspired by Leeds 2023, Brighton Festival, Ghent Festivals:

Develop a “Festival of Exeter” programme distributed across neighbourhoods, building on the existing June Boom model Embed schools, communities, and voluntary groups and use neighbourhood-based assets.

Offer flagship commissions and participation programmes Integrate partnerships with the University and Met Office linking culture with science and research.

Raise visitor numbers through cultural seasonality.

BENCHMARKS

Bench marking Exemplars.

4. Invest in Next-Generation Cultural Infrastructure
Inspired by Manchester, Oxford, Glasgow:

Invest in and upgrade existing cultural venues with flexible performance spaces which can host rehearsals, residencies and workshops when not being used for performances.

Upgrade digital promotion platforms and exhibition facilities.

Identity anchor venues for local artists, community participation, production and creation, and touring shows.

5. Develop Cultural Neighbourhoods & Creative Quarters
Inspired by Nottingham, Utrecht, Bristol:

Develop creative workspace clusters with visible creative identities, workspace, branding and events.

Develop a ‘Made in Exeter’ brand and ecosystem supporting creative freelancers, film/ digital makers, craft, design, textiles, music and gaming and including pop-up shops and a commitment to local procurement.

Support independent retail and food quarters.

Ensure culture-led regeneration around transport nodes and new developments.

6. Use Public Space as a Cultural Asset.
Inspired by Copenhagen, Utrecht, Ghent:

Use waterways and green streets as cultural corridors
Integrate outdoor performance and small-scale installations into green spaces.

City-centre pedestrianisation aligned with cultural events.

7. Deliver an Expanded Cultural Education & Youth Platform
Inspired by London’s LSO Discovery, Manchester’s In The City:

Align all the cultural partners around one youth talent scheme and articulate the story much more clearly around talent development opportunities, a pipeline into the creative industries and opportunities for everyone at all stages of their careers, leading with:

- creative pathways for 11–25s.
- youth-led festivals.
- production/tech training.
- apprenticeships with local venues.
- a “Young Creatives Panel” for the Cultural Strategy.

8. Create a Long-Term Cross-City Cultural Leadership Model.
Inspired by Manchester, Leeds, Glasgow:

Creation of a shared governance and investment model, looking to existing and previous examples (the Exeter Partnership, Creative Exeter), aimed at creating funding leverage, stable planning and a coherent voice and including partners like:

- Exeter City Council.
- Funders like Arts Council England.
- University.
- Cathedral.
- BID.
- Met Office.
- Cultural organisations.

BENCHMARKS

Bench marking Exemplars.

City of Literature Comparators and Examplars.

We've included examples of three stand out UNESCO Cities of Literature that are effectively leveraging the designation for tourism, investment and cultural development. Common success factors include:

- dedicated infrastructure or hub which helps make the designation tangible.
- embedding literature into place-making raising its visibility city-wide.
- connecting the designation to economic and tourism goals, strategies and outputs.
- using the UNESCO brand as a marketing and investment lever and differentiator.
- supporting emerging talent, book industries and reading for all, strengthening the ecosystem overall.

Norwich.

How it's using the designation:

Norwich holds the title of UK's first UNESCO City of Literature (designated 2012). It has developed a clear strategy ("Writing the Future") that links the designation to local culture, tourism and economic development. The city has built a physical hub: the National Centre for Writing (NCW) at Dragon Hall which acts as a home for the UNESCO-Literature agenda, writer residencies, international exchanges and community literacy programmes. Their strategy explicitly states the aim to embed the designation across all geographies of Norwich and Greater Norwich: eg: "every neighbourhood will have at least one UNESCO City of Literature champion". They link the literature programme to wider place-investment tools (Town Deal, Creative People & Places) and show the designation isn't just symbolic—they aim to connect to inward investment and regeneration.

What Exeter could learn from Norwich:

Create a dedicated physical/organisational hub for the designation (writing residencies, international links).
Embed the designation across neighbourhoods, not just the city centre.

Link literature status to regeneration/investment funding streams.

Use a clear strategy document that shows how literature connects to economy, place and community.

BENCHMARKS

Bench marking Exemplars.

Krakow (Poland).
How it's using the designation:

Kraków was designated as a UNESCO City of Literature in 2013. It has a multi-pronged programme: supporting book industries; integrating literature into public space (benches, QR-codes with author excerpts); literary walks and festivals; international residencies. The "Champion Bookstores" initiative supports independent bookshops as cultural and economic actors. The city uses literature as part of its tourism product: literary trails, open-air book fairs, public art linked to writing and authors. It explicitly supports young talent, debut writers, and uses literature to connect local culture with international networks.

What Exeter could learn from Kraków:
Integrate literature into everyday public space (benches, QR-codes, trails) to raise city-wide awareness.

Support independent book/reading economy as part of cultural and economic offer.

Use literature designation to enhance tourism product (literary walks, festivals tied to writing).

Link local talent development (new writers) with the city's identity.

Quebec City (Canada).
How it's using the designation:

Québec City emphasizes both its literary heritage and its modern writer ecosystem: over 200 literary creators, more than 100 organisations operate under the UNESCO banner. It has transformed a historic church into Maison de la littérature, anchoring the designation in a landmark building and creating a visitor attraction. The city uses its UNESCO literature status to strengthen its tourist appeal — described as "booklover's utopia" — and enhances its global profile as a cultural destination. It underscores bilingual heritage (Francophone and Anglophone writers) which broadens its appeal regionally and internationally.

What Exeter could learn from Québec City:

Use a landmark building or venue to anchor the literature brand, making the UNESCO status a visible part of the visitor offer.

Use literature designation explicitly in tourism marketing to raise global awareness.

Leverage heritage and writing identity to appeal to niche cultural tourists (bibliophiles, writer residencies).

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