

Exeter City Centre Technical Appraisal

Supporting document for the Exeter City Centre Vision, Strategy and Action Plan document

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1. Purpose and Structure of the Document

The purpose of this Appraisal of Exeter City Centre is to inform the City Centre Strategy and Action Plan. Together these two documents are to ensure that the city centre is fit for the future. Adapting to post-pandemic consumer, transport and commercial trends, the new City Centre Strategy and Action Plan complements existing strategies and aligns with the Exeter Vision 2040 and updated Corporate Plan.

This document appraises the city centre first through a series of overarching themes. These are characteristics which define the city centre. There is then an appraisal of the urban form identifying the physical elements that make up Exeter's urban fabric. Thirdly there is a review of relevant Planning Policy. This is followed by a chapter which looks at relevant global trends in order to learn from cities around the world.

The Appraisal is informed by desk-based research and workshops which were held with stakeholders and Councillors in the city. Attendees included businesses, public sector institutions including local government representatives, educational organisations, stakeholders, cultural and heritage organisations, citizens groups and community organisations. Summaries of the engagement workshops are included in the Appendices.

Exeter is doing very well, as a workshop attendee said *'Don't forget the amazing things Exeter already has'. We're proper worth it.* It is young, vibrant and an increasingly successful city. Many of its businesses, communities and individuals are active participants in the city's success and new homegrown enterprises based on local strengths and energy are emerging. Alongside these successes there are challenges as set out in the following chapters.

2. Appraisal of Characteristics which define the City Centre

Urban character, quality and resilience are strong factors determining the success of city centres. This reflects a wider shift amongst consumers, residents and visitors for 'experiential' places which have a diversity of live-work-play offer. Visiting town and city centres has become a key recreational and leisure activity and people will travel to get the experience they seek, such as St Sidwell's Point at St James Park. In contrast, living and working within town and city centres has become less meaningful due to flexible working patterns and the opportunities presented by remote working. As a result, cities across the UK are investing in their urban environment as a basis for competing locally and nationally. The Bounds of our City Centre section examines the distinctive

characteristics that define Exeter's city centre looking at its green spaces, its heritage and shopping offer, education, its quarters and transport.

2.1. Economy

Certain parts of Exeter such as the Quay are vibrant and have a strong diversity of uses. In other parts of the city centre, such as the High Street or Sidwell Street, uses are focused on a specific sector, for example retail or residential, rendering some areas inactive at certain times of day. Elsewhere in the Princesshay Shopping Centre and where Sidwell Street meets the High Street, large units are currently vacant and have been for some years.

Since the pandemic, vacancy rates in the city centre have increased from 5% to 12% and whilst this number appears to be declining and below national trends, local businesses and stakeholders suggested that reactivating vacant units Debenhams, are pivotal to growing Exeter's retail offering and the wider economy. Recent footfall data shows that footfall is increasing year-on-year in the city centre, demonstrating the significant opportunity to engage with people who are in the area.

Centre for Cities research has identified that Exeter sits 55/63 cities, for the highest proportion of Start-Ups being founded in the country, with 33.2 business start-ups per 10,000 population (2023)¹. A key challenge that was identified by stakeholders was the need to encourage local entrepreneurship. In Autumn 2024, it was reported that Exeter's Start-Ups had received over £2million from the Start-Up Loans Programmes as part of the British Business Bank². Devon County Council also contains several business support projects that can provide financial and operational support to new businesses in the South-West. More data and information are required from the public and private sectors in to understand what investment is currently being made/is needed within the city currently.

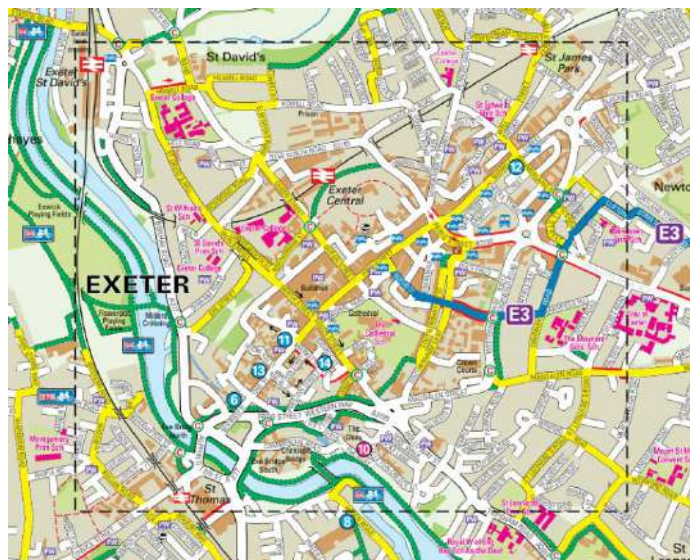
Exeter is home to key institutions such as Exeter College, the University of Exeter and the Met Office, as well as business incubators and cultural and creative industries. A key issue that was raised by stakeholders was the challenge of retaining graduates within the city. Students from the University of Exeter who attended the engagement workshops suggested that other cities in the UK were more appealing in terms of lifestyle and job opportunities. Another point identified by several groups was the need to make the most of the opportunity for collaborative working between key organisations.

2025 the City Council formed the Exeter Partnership, a group comprising of key institutions and stakeholders from across the city. The group comes together to develop innovative strategies to drive forward the city's key priorities, ensuring a brighter and more sustainable future for Exeter and its communities. Although a recent collaboration, it represents an important first step into addressing some of the key issues that the city faces.

2.2. Transport and Movement

Exeter is home to around 128,000 people, with a further 35,000 commuting into the City centre on a weekly basis (Census). According to the Exeter Transport Strategy 2020-2030, Exeter residents represent the largest part of Exeter's labour pool (52%) and account for 35% of car-based commute trips to a destination in the city.

According to Department of Transport data³, the number of people cycling at least once a week within the District has been relatively unchanged since the start of the pandemic (approximately 16% in 2023), but this figure has dropped significantly from levels before the pandemic (at its peak, 29% in 2017). Cycling along the edge of the city within the Exe Valley is very popular and ably supported by attractive and



convenient cycling infrastructure. However, stakeholders told us that cycling infrastructure within the city centre could be improved as they did not feel safe cycling through the city. Upon reviewing the [city centre's cycling map](#), dedicated cycle routes within the city centre are piecemeal until you venture into the Exe Valley. Advisory Cycle Routes (as pictured in yellow on the cycle map) are often shared with public transport or

vehicles, and the surface quality and width of many traffic-free routes were said to discourage many people from cycling.

The number of people in Exeter who walk at least 3 times a week has 'seen a general decline since 2017, from 58% to 51%⁴. The urban appraisal in the next section identifies the physical challenges to walking within the city centre, forcing many commuters and visitors to use Exeter's public transport network.

Findings of research undertaken by Friends of the Earth and the University of Leeds⁵ outline that Exeter bus services have fallen by 69 trips per hour over the past thirteen years, from 167 in 2010 to 98 trips per hour in 2023. The importance of public transport services was frequently raised during our conversations with stakeholders as a means of reducing vehicle traffic and ensuring the city centre was appealing for all visitors.

2.3. Culture

Exeter contains a wealth of cultural and heritage assets, however many of these are often hidden away within the city centre or lack wayfinding guiding visitors to their



location. Much of the city's heritage branding has also become dated and is in need for a refresh in line with public realm improvements. Certain areas of the city also have a distinctive character that could be celebrated more. For example, the Quay and Exeter Cathedral, two of the city's key cultural areas feel

disconnected from the rest of the city centre.

During our conversations with stakeholders, we were told venues, museums and theatres tend to work in isolation and could work more collaboratively with the City Council to build a collective identity based around culture and heritage. The existing lack of collaboration amongst Exeter's key institutions has resulted in festivals and events running in parallel. Transparency and promotion of upcoming events were also highlighted as an important tool in boosting culture in the city. For example, in 2025, Exeter was one of eight host cities for the Women's Rugby World Cup which was heavily promoted within the city and well supported and attended.

Specific cultural venues such as the Corn Exchange were identified as in need of an upgrade and potentially unfit for the city's ambitions for growth. Our research uncovered several of Exeter's public art projects, showcased within the public sculpture and art trail. While this is engaging, there is a lack of in-person information about the trail. Exeter has other art murals and places of 'joy' that have not been mapped or identified as part of a visitor attraction.

Exeter, along with several other cities in the UK has UNESCO City of Literature status. The city successfully runs several events per week⁶ that draw on the prestigious status of the designation. The city must continue to promote a comprehensive programme of literature-based events that are geared towards and inclusive all sectors of society.

2.4. Climate and Ecology

In 2022, research conducted by the University of Sheffield⁷ identified that Exeter's city centre has more green spaces and trees than any other city in the UK. In addition to benefiting mental health and wellbeing, Exeter's wealth of green spaces is contributing towards the climate and ecological emergency and clean air agenda. Along with a large quantity of green space, Exeter provides quality, biodiversity rich areas such as the Exe Valley.

The Devon Local Nature Recovery Strategy has been published, this strategy is set to include information about the city's approach to nature recovery.

In 2023, the Tree and Woodland Strategy was adopted. The strategy provides a framework for the delivery of a progressive arboriculture approach and reflects concerns and interests expressed by residents, and the views and guidance arising from the arboriculture industry. The Strategy illustrates Exeter's current position and recommends a set of proposals for the future of Exeter's Tree and woodland landscape.

Having a substantial green space and tree strategy is essential for the city centre as Exeter has increasingly large levels of commuting to work by car and associated issues with traffic congestion. As a result, Air Quality Monitoring Areas (AQMAs) are in place along the main arterial roads leading into the city centre. The Council have taken forward a few direct and policy-based measures in pursuit of improving air quality such as the trialling of council electric vehicles demonstrate a commitment to their low-carbon agenda.

In 2019, Exeter City Council declared a climate emergency. In response to this, Exeter City Futures (ECF), a community interest company led by key organisations in the city including the City Council, launched "Towards a Carbon-Neutral Exeter" a

Net Zero Exeter 2030 Plan. The key challenge the city faces is the need to make significant progress in reducing emissions from buildings and transport to deliver net zero. In response to this challenge and overarching ambition, the city has already achieved a number of goals and has prioritised a number of responsibilities and actions in reaching their [carbon neutral agenda](#).

2.5. Public Realm

Safety and wellbeing are pressing concerns in Exeter city centre. This sentiment was echoed by local stakeholders who felt that anti-social behaviour was still the most pressing issue in the city. Results of the Exeter Residents Survey 2025 show that many residents, especially women, disabled people, and those living in central areas and areas of higher deprivation, feel unsafe after dark. In addition, traders suggested their businesses were negatively impacted by the perception and reality of anti-social behaviour.

Understanding the underlying causes of anti-social behaviour is complex and communicating this to the public remains a significant challenge. [Safer Exeter](#), the Community Safety Partnership, for the city launched new priorities for the city, which include:

- Hate Crime
- Violence Against Women and Girls
- Anti-Social Behaviour in our neighbourhoods
- City Centre

Issues related to the public realm, such as street cleanliness, bin and waste collection, and the need for repairs to street surfaces, furniture, landmarks, and buildings further detract from a feeling of safety and the appeal. Stakeholders emphasised that key streets and spaces are in need of repairs, and this should be given priority above other projects.

2.6. Inclusivity

As the population grows in cities across the UK, there is increasing strain on the housing market. In Exeter, rental prices are becoming increasingly unaffordable for many residents with average monthly [rent costing £1,316⁸](#). With much of the new city centre housebuilding being geared towards students, there is a concern that major development sites in the city centre are not delivering genuinely affordable housing for its residents.

Alongside housing, stakeholders were concerned about the range of uses and spaces on offer within the city centre and their inclusivity for the city's diverse demographic. As consumer habits and the demands of a population change, the city must develop a multi-use offering that caters to the city's existing and future population. Other key issues within the topic of inclusivity were the appropriateness and safety of the city's public spaces for people who identify as female, the accessibility of visitor information in key parts of the city, and the challenging topography for people who struggle with mobility in and around these public spaces.

Challenges relating to inclusivity within Exeter also extend to homelessness and addiction, two issues which are currently prevalent within the city centre. Stakeholders including Devon and Cornwall Police understood the sensitivity of the topic and the need to develop a series of bespoke interventions to address the

problem. In 2022, [Safer Exeter, a Community Safety Partnership](#) made up of different organisations, have developed a list of priorities that will aim to address this.

3. Appraisal of the Urban Form and Areas of Focus

3.1. Urban Form of Exeter

Exeter has an essentially traditional urban form which is still strongly shaped by the original Roman Walls. Within the walls the urban form still reflects the original medieval structure with a central High Street and four quarters arranged around the Cathedral, the Guildhall, Exeter Castle and Princesshay. This layout provides a flexible and interesting structure with the main shopping street, the High Street, acting as the focus of movement and a connector between each of the quarters. The [City Centre quarters](#) each provide different and complementary ‘offers’.

The Cathedral is the focus of Exeter’s heritage and its major visitor attraction and serves as a de facto public space for the city. The Guildhall has emerged as a strong leisure focus for the city and provides a distinct shopping offer which contrasts with the comparison goods offer of the High Street and Princesshay. Many people perceive the core city centre as ending where the High Street meets South Street because the large shops transition into smaller independent shops at this point and the gradient steepens towards Fore Street. This does not detract from the fact that Fore Street and the nearby historic areas, are a key part of the city centre connecting to the river - once a focus of the mills which gave Exeter some of its wealth.

Beyond the city walls the urban form of the city is largely shaped by the routes of the historic roads into and out of Exeter. Except for Sidwell Street which has been a focus of economic activity since Roman times, areas immediately adjacent to the core city centre quickly become residential in character, albeit containing important city assets, including Exeter City Football Club, University of Exeter, Exeter College, St David’s Station and Exeter Quay. The inner bypass and associated junctions, from the top of Sidwell Street through to Exe Bridges serves to disrupt the historic grain on the eastern side of the city and separate areas such as Newtown, Heavitree, and St. Leonards from the City centre core.

3.2. Key areas of focus

Several areas within the city centre have been identified as areas to focus on for Vision, Strategy and Action Plan, these are summarised below:

3.2.1. High Street

The High Street was improved almost 20 years ago and underwent a step change at this point. Unlike most cities of its size and stature, Exeter’s High Street is not fully pedestrianised as it accommodates buses, pedestrians and cyclists. This has had an impact on the availability for space for pedestrians and has constrained the design and materials used in the High Street itself. Today the overarching urban environment presented by the tired looking materials on the carriageway and interaction between pedestrians, buses and cyclists does not meet the standards expected of a contemporary city centre. Moreover, the city’s ambition to grow will place further demand on the city’s urban fabric (including the High Street) to accommodate increased footfall. In combination, these factors highlight the need for a strategy to maximise the quality and enjoyment of

the city centre for people walking and cycling and improvement of connections to the quarters and the key areas of the city.

3.2.2. Connection between the High Street and Fore Street

Fore Street is a key asset of the city centre and with a growing mix of independents and businesses, it has much to offer residents and visitors. Many of the businesses on Fore Street are at the forefront of responses to changes in consumer choices, with ethical retailers located there. Such businesses have much to add to the overall city centre offer and yet due to the poor-quality pedestrian nature of South Street, Fore Street feels quite separate from the High Street. Fore Street's poor connectivity with the High Street is further exacerbated by its narrow pavements and weathered materials, thereby discouraging pedestrians to use the street as a connecting route.

3.2.3. Bus Station/Grecian Quarter

The demolition of the old the Bus Station and the opening of St Sidwell's Point Leisure Centre marks the start of a new chapter for this area of the city centre, delivering the renewal of the urban fabric and providing a focus for a new Grecian neighbourhood. Investment in places to live in this area is helping to stimulate private sector investment along Bampfylde Street and Sidwell Street, with new restaurants and cafes opening. New developments on other parts of the old Bus Station site will help catalyse further investment along the tired-looking and anti-social behaviour hotspot Sidwell Street, to regenerate many of its vacant and derelict shops. A key strategic goal must be to reintroduce Sidwell Street's role both as a safe and inviting neighbourhood centre that celebrates the arrival experience into the primary shopping area.

3.2.4. Connections between the City Centre and Quay and River Exe

Like Fore Street, the Quay is an attractive, diverse and interesting working, living and leisure destination, however there is a lack of clear and legible connections between Exeter Quay and the city centre. A lack of clear visible signage combined with narrow and poorly overlooked pedestrian routes that cross and go under major roads exacerbate the lack of connectivity between the city centre and this key area of activity.

The importance of the Quay will only increase when Water Lane is brought forward for comprehensive housing development as a new city neighbourhood. Connections to the Quay are undermined by Western Way, the poor quality of the urban environment around the Cathedral, the Cathedral & Quay car park, and the quality of Exe Bridges. Significantly improved connections to the Quay would immediately improve the scale and diversity of the city centre offer and help bind South Street and Fore Street into the fabric of the city.

3.2.5. Inner bypass and the key arrival points into the City Centre

Inherently linked with the previous point, the inner bypass is a key challenge for movement in Exeter, separating the city centre from residential areas to the east. The road causes these residential areas to become separate entities, reliant on services and amenities that are easily walkable in the opposite direction to the city centre. In addition, the key junctions between the inner bypass and the incoming streets (Sidwell Street, Paris Street, Topsham Road and Exe Bridges)

form poor arrival points into the city centre. At present there is no sense of arrival into Exeter and this sentiment is echoed elsewhere in the city centre.

3.2.6. Arrival at St David's station

The arrival into the city centre from St David's station (the city's busiest station, recording over [2.7 million visitors in 2023-24⁹](#)), establishes a poor first impression of the city, dominated by a large car park and mix of undistinguished buildings ranging from a budget hotel to Victorian terraces and student accommodation. Pedestrian access to the city centre is via a narrow steep alley, as well as poor wayfinding to the nearby river and Exeter Quay. This area has also been identified as a priority under Liveable Exeter. Its enhancement must be a priority to anchor the western corner of the city and make it more connected to the city centre's urban core.

3.2.7. Exe Bridges

Exe Bridges is an area which can significantly impact the character and



experience of Exeter. Currently, the gyratory blocks Fore Street and the core city centre from arguably its greatest asset, the Exe River. The highways infrastructure also stops the wider Exe Valley Park flowing through the city centre. As outlined in the Liveable Exeter Vision, Exe Bridges has the potential to be repurposed as the main access

between the city centre and the river accommodating cycle movement with its active travel friendly terrain.

3.2.8. City centre green spaces and gardens

Exeter city centre has some great parks and gardens which form a strong green infrastructure network for the city. These include Rougemont Gardens, Northernhay Gardens, Southernhay, Cathedral Green, Belmont Park, Bury Meadow Park, spaces along the historic walls, Friernhay Gardens and green spaces from the Quay. Each of the city centre quarters contain a green space and are sometimes interconnected when their parks and gardens meet one another. Despite this coherent network, wayfinding and visibility of these green spaces are poor and could play a stronger role in the identity of the city. Exeter's parks and gardens form a key part of the infrastructure for making Exeter an enjoyable city to visit. To elevate their profile within the city, they need to be recognised and should form an explicit part of the city offer, better linked and programmed as connected spaces. The city should also address how the existing (and future) provision of green infrastructure combats climate change specifically within the city centre context.

3.2.9. Making the most of the heritage of the city

Exeter has a very special heritage. The lynchpin of this is the Cathedral and the Royal Albert Memorial Museum (RAMM). The experience for visitors to Exeter's heritage is not as good as it could be. The drop off for coaches in South Street is into a poor-quality urban environment. In addition, there is a noticeable lack of information about the city centre when moving through it. This includes where

key historic assets, and other service and amenities are located and interconnected. Linkages between the Cathedral, RAMM and other assets such as St Nicholas Priory is poor. Overall, there is significant scope to improve the interpretation of key assets, particularly through human scale interventions and a range of digital technologies.

3.2.10. Implications for the city centre Vision, Strategy and Action Plan

Exeter city centre is not fulfilling its potential as an urban environment. There are several key 'structural' issues in its urban form that need to be addressed so that it optimises the value of all its assets for residents and visitors. In simple terms, the key assets of the city need to be held together by a high quality, diverse and seamless public realm which is designed for the pedestrians and cyclists, aged 8 to 80. Its built and heritage assets need to be recognised, well-connected and made the most of within the urban fabric.

Many of the focus areas are also highlighted in the Liveable Exeter vision. Addressing these areas will deliver tangible benefits to the city, which together will form an overarching offer that is bigger than the sum of its parts; a healthy and sociable public realm framework that connects beyond the City Walls.

4. Appraisal of Relevant Strategies and Planning Policy

This chapter reviews the framework within which the City Centre Strategy sits, as set by the existing strategies developed for Exeter, including the Exeter 2040 Vision, the Corporate Plan and Liveable Exeter, as well as relevant planning policy of the National Planning Policy, Exeter's Core Strategy and emerging New Local Plan - the Exeter Plan. It considers how the City Centre Strategy responds to these in developing a city centre that effectively responds to the forces of change.

4.1. Exeter 2040 Vision

'This is our city, this is our future'

'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.'

The [Exeter Vision 2040](#) is a long-term vision to bring about transformational change and sustainable growth in the city. Created by Liveable Exeter, it is being used to inform the emerging planning strategy of the Exeter Plan and outlines a vision for a future Exeter that fosters collaboration; guarantees every resident has a secure, affordable, and healthy home; boasts a robust and thriving economy; promotes healthy, active lifestyles; offers world-class education and training; nurtures a lively city centre and inclusive, connected neighbourhoods; reduces carbon emissions; and gains national and international recognition as a city of culture. The vision is built from seven key outcomes, which are as follows:

- An innovative and analytical city
- A healthy and inclusive city
- The most active city in the UK
- Accessible world class education
- A liveable and connected city
- A leading sustainable city

- A city of culture

4.2. Corporate Plan 2025-2028

The [Corporate Plan](#) sets out the key priorities that the Council will focus on over the period of 2025-2028, which are outlined under the four strategic priority areas of: Local Economy, Homes, People and Sustainable Environment. For each priority, the Corporate Plan sets out a series of intended outcomes. Delivering the key priorities - in collaboration with the Council's partners and stakeholders in the city - is intended to contribute to meeting the aspirations set out in the Exeter Vision 2040.

4.3. Liveable Exeter

Alongside the Exeter Vision 2040, the Liveable Exeter Initiative developed the [Liveable Exeter Placemaking Charter](#). Liveable Exeter complements the Exeter Vision 2040 by focusing on delivering new homes in the city in high quality developments and transforming previously developed land, to strengthen existing communities and create new neighbourhoods. Several Liveable Exeter principles have been created to help shape the largest developments to ensure they meet the needs of those living in Exeter. The principles are as follows:

- Memorable places
- Outstanding quality
- Welcoming neighbourhoods
- Liveable buildings
- Active streets
- Space for people and wildlife
- Connected culture

As part of the Exeter Plan, Liveable Exeter will help to deliver the Exeter Vision 2040. It defines how the growth of the city can be shaped by its unique qualities in a way that benefits people, the environment and the economy.

4.4. Existing Strategies for Exeter

A multitude of factors have meant that previous city centre strategies have not been effectively implemented to achieve their full potential. Changing governance structures, mixed with the turbulence caused by national austerity and the COVID pandemic (and its legacy) have repeatedly shifted the political focus in Exeter.

In 2022, the City Council released 'our plans for the future', a list of ten key documents that outline their strategic focus to ensure the success of to ensure success of the city and Greater Exeter. These strategies include:

- [Recovery Report - Building Exeter Back Better](#)
- [Our Corporate Plan 2022-2026](#)
- [The Vision document transformational housing programme](#)
- [A city centre vision for a green capital](#)
- [Built accommodation strategy](#)
- [South street regeneration, urban design proposals](#) - Executive, Oct 2018
- [Air Quality Strategy](#)
- [Exeter Local Industrial Strategy](#)
- [Our plans for promoting active and healthy lifestyles](#)
- [Exeter Budget Speech](#) - February 2021

Stakeholders told us that while these strategies had often identified the most appropriate objectives for the situation, they sometimes lack specific actions necessary for successful delivery.

Positively, many of these strategies were developed in collaboration with local businesses, stakeholders and community members. For example, the Exeter Local Industrial Strategy was written in collaboration with The University of Exeter, The Met Office, Royal Exeter and Devon NHS Trust, Exeter College, County and District Councils and the Exeter City Future Partners Network. Despite this widespread involvement, it remains uncertain whether this strategy and others accurately represent the needs of all sectors of the city centre.

4.5. National Planning Policy Framework (NPPF) (December 2024)

The NPPF sets out the Government's planning policies for England and how these should be applied. As such, they will inform and complement the development of policies within the emerging Exeter Plan. Regarding city centres, Paragraph 90 sets out that planning policies should promote the long-term vitality and viability of centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. This should allow for a suitable mix of uses (including housing) and reflect their distinctive characters. Further to this, local authorities should define the extent of centres and their primary shopping areas and make clear the range of uses permitted in such locations. It goes on to highlight that allocations should be made to meet the scale and type of development likely to be needed.

In relation to housing, paragraph 130 sets out that plan policies should aim to optimise the use of land in their area. This should include seeking a significant uplift in the average density of residential development within city centres and other locations that are well served by public transport where appropriate.

4.6. Exeter's Core Strategy (2012)

Although the Core Strategy is soon to be replaced by the Exeter Plan, it is important to recognise the objectives and bold strategy it had set out to guide development in Exeter until 2026. The strategy focussed on addressing climate change, diversifying the economy with a focus on knowledge-based sectors, and enhancing the city centre's retail, cultural, and tourist facilities to strengthen its regional influence. Specific objectives included minimising travel reliance on cars, promoting public health, and preserving the city's historic character. The Core Strategy further emphasised regeneration priorities for the city centre, focusing on enhancing its historic quality, protecting the Central and Southernhay and Friars Conservation Areas, fostering social interaction through public art, improving retail appeal, integrating residential developments, and enhancing biodiversity while supporting a decentralised energy network. The Exeter Plan contains many of the same objectives as the Core Strategy, however there are key changes to ensure it guarantees long-term resilience in a contemporary setting.

4.7. The Exeter Plan

Although the Plan is yet to be adopted, the New Local Plan - the [Exeter Plan](#) sets out an ambitious strategy to ensure Exeter is a sustainable, dynamic and thriving city fit for the 21st Century. A central element of the Exeter Plan is its spatial strategy. Flowing from Exeter's Vision 2040, the spatial strategy outlines the core principles

that will guide the patterns and features of development within the city. A key change from the adopted Core Strategy is that the Exeter Plan's spatial strategy moves away from the provision of large, greenfield urban extensions on the edge of the city, which have now largely been built out meaning there is very limited capacity for additional development on the edges of the city. A key strand of the new spatial strategy is to steer the majority of development to brownfield sites in order to protect the city's landscape setting and retain Exeter's environmental quality.

These objectives are reflected in the location of the proposed development allocations within the Exeter Plan, with most of the development proposed on six strategic brownfield site allocations that are located close to the city centre and key public transport hubs with good access to green infrastructure including the Valley Parks. Choosing strategically suitable sites will ensure Exeter's growth is sustainable for significant development, further solidifying its role as the region's economic hub.

In addition, The Exeter Plan sets out the strategic priorities for the vitality, viability and resilience of the city centre, district centres and local centres. Draft Policy RFC1 sets out the Council's intent to work with partners to protect and enhance the vitality, viability and resilience of the city centre.

It further adds that the Council will support a mix of uses and activities which diversify the offer of the city centre, extend its hours of activity, enhance the night-time and visitor economy, improve its cultural offer and ensure its future resilience as the major centre for the sub-region. Attractive public spaces and high-quality provision for active travel and public transport will be also essential to provide vibrant places for people and increase footfall.

5. Global Trends – Learning from Cities Around the World

City centres are in a constant state of flux. This is most evident when looking at the shift to remote and hybrid working models, following the COVID-19 pandemic. This has led many people to leave urban centres in search of more affordable living and improved quality of life. With [25% of the UK workforce working from home at least some of the time](#), individuals have flocked to suburban or rural areas, where housing is generally more spacious and costs are lower. This mass exodus has created a challenge for cities, which now face the difficulty of enticing workers to return. The appeal of the urban lifestyle—once centred around proximity to offices and amenities—has diminished as remote work makes it easier to live farther from the hustle and bustle of city life. To reverse this trend, cities must rethink their value proposition, offering not only a vibrant urban environment but also better work-life balance, flexible climate-friendly spaces and improved transport infrastructure.

For Exeter to succeed as a national and global leader among cities, it must draw inspiration from global examples that are implementing innovative strategies to drive their growth and success. Economically, cities such as Berlin have become appealing to startup founders and businesses, as it has worked hard to foster a dynamic tech ecosystem through its multicultural and collaborative culture leading to the sharing of knowledge, resources and cutting-edge technologies. Shifting to the retail scene, cities like Tallinn, Estonia are using technology to innovate the food delivery experience by introducing a fleet of robots that will bring autonomous food delivery to more customers whilst reducing local traffic and emissions.

Alongside the economy, the world's most dynamic city centres will also leverage the opportunity to improve how people live within the city and how these improvements can create a healthier and happier urban environment. In places like Lisbon, the city is addressing increasingly unaffordable rents by ensuring the public sector prioritises building new properties and renovating vacant spaces whilst introducing rental subsidies for low-income families. The city is also initiating several housing co-operatives, a community-led approach to housing that has become a common way of living in Denmark and The Netherlands.

Elsewhere in the world, cities such as Auckland have been developing creative placemaking projects that bring design, the community and heritage together. Located in the centre of Auckland's CBD, Pā Rongorongo serves as a central hub and information centre dedicated to honouring Auckland's Māori identity through its design. This engaging community space includes wooden benches, a shed equipped with a digital wall, and a gathering area where visitors can fully engage with the city.

Moving between these cultural hubs and the home should also be a priority for cities, and the world's most thriving urban centres have recognised the importance of a well-connected city focused on people. In Singapore, public transport infrastructure has evolved with technology, as the introduction of contactless payments and extensive real-time datasets about traffic patterns, schedules and crowd sizes at stations have helped city planners to build solutions that help the residents optimise their travelling time. Moving on foot or by two-wheels is also being prioritised in cities around the world as places of varying shapes and sizes are investing more heavily in cycling infrastructure such as Utrecht and Bogota.

Linking all these global examples is the need to consider how these approaches will address the sources and impacts of the climate crisis. Best practice examples around the world demonstrates how a multitude of actions can contribute to reducing emissions and climate-resilience. Munich's decarbonisation of the city's power and prioritising of renewable energy evidence the opportunity of developing climate-positive city-wide energy programs. In Lima, Peru, the city is piloting innovative technologies such as water harvesting in fog oases in the hills surrounding the capital city to address water scarcity within the city.

If Exeter is to emerge as a global exemplar of modern city centres, it must develop a series of place-specific solutions to the city's most pressing challenges. This means becoming a city that not only appeals to investors but also prioritises liveability, sustainability, and ease of movement, offering efficient public transport, climate-friendly infrastructure, and spaces that support both work and play. Exeter is already well-positioned to grow, with the right blend of history, innovation, and community spirit. What it needs now is a cohesive, forward-thinking strategy, one that reflects the needs of today's residents while laying the groundwork for future generations. With the right vision, Exeter can become a model of thriving, resilient urban living for the decades to come.

¹ Centre for Cities, City Factsheet: Exeter available from: <https://www.centreforcities.org/city/exeter/>

² British Business Bank, 'Exeter businesses benefit from £2 million in funding from the Start Up Loans programme' (3 September 2024), available from: <https://www.startuploans.co.uk/media-centre/exeter-businesses-benefit-ps2-million-funding-start-loans-programme>

³ Department for Transport, Walking and Cycling Statistics (Dataset CW0302: [Proportion of adults that cycle, by frequency, purpose and local authority: England](#)), available from:

<https://www.gov.uk/government/statistical-data-sets/walking-and-cycling-statistics-cw>

⁴ Department for Transport, Walking and Cycling Statistics (Dataset CW0303: [Proportion of adults that walk, by frequency, purpose and local authority: England](#)), available from:

<https://www.gov.uk/government/statistical-data-sets/walking-and-cycling-statistics-cw>

⁵ Friends of the Earth and University of Leeds, 'How Britain's bus services have drastically declined' (28 November 2023), available from: <https://policy.friendsoftheearth.uk/insight/how-britains-bus-services-have-dramatically-declined>

⁶ Exeter City of Literature, 'Events Calendar', available from:

<https://www.exetercityofliterature.com/event-picks>

⁷ University of Sheffield, 'Greenest city centres in Great Britain' (23rd November 2022), available from:

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⁸ Office for National Statistics, 'Housing prices in Exeter' (last updated 22nd October 2025), available from:

<https://www.ons.gov.uk/visualisations/housingpriceslocal/E07000041/>

⁹ Office of Rail and Road, 'Estimates of station usage', available from:

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