



EXETER
CityFutures

RETAIL IN A POST-COVID CITY

Outcomes of Exeter's Emergency Roundtable

Held Online: 17 June 2020



Introduction

In the week non-essential businesses were allowed to re-open following further relaxation of the Covid-19 lockdown, Exeter City Futures invited Exeter retailers to meet together with others who work with the sector to boldly acknowledge the changing face of the city and explore the opportunities facing their businesses in a city determined to 'Build Back Better'.

The Emergency Roundtable held on Wednesday 17 June 2020 was designed to enable Exeter's retailers, those who rely on and support them, and those with a vision for retail in the city, to:

- Provide an opportunity for Exeter's retail community to take a view on what the changing role of the city means for them
- Offer Exeter's retailers a platform through which they can receive guidance, share best practice, benefiting from input both from the city and their peers
- Support Exeter's retail community in collectively determining solutions they need to see adopted in the city and identify those willing to take those solutions forward

The Panel consisted of representatives of large and independent retailers in Exeter, Exeter Chamber of Commerce, Exeter City Council and Devon County Council, and delegates were a mix of retailers, retail and trade associations including Exeter's Business Improvement District and the Federation of Small Businesses, public sector, residents and community groups. The event concluded with recommendations for initiatives that attendees want Exeter to take forward.

Contents

1. The Panel
2. Poll: What type of organisation do you represent today?
3. The Agenda
4. Panel Discussion
5. Poll: How confident are you now that Exeter's retail sector can reopen and thrive?
6. Roundtable Discussion
7. Recommendations: top initiatives for the city to address
8. Poll: Vote on recommended top initiatives for action
9. Zoom Chat and its Analysis
10. Panel Reflection
11. Next Steps

Quick Links

- [Panel Discussion](#) (link to video)
- [Roundtable Discussion](#) (link to summary)
- [Poll: recommended priority initiatives](#) (link to Poll)
- [Chat](#) (link to written event discussion)
- [Panel Reflection](#) (link to video)

Background

With non-essential retailers able to re-open their doors to shoppers from 15 June 2020, there is an undeniable determination by people in Exeter to ensure the city's businesses continue to thrive as we emerge from the Covid-19 pandemic.

Closed since March, a significant part of the burden whilst closed and effort made in re-opening is carried by Exeter's retailers – independents and national names, selling goods and services from books and art, to clothes and toiletries, furniture, food, and cars – in the city centre, local neighbourhoods and in retail parks. Exeter City Council and Devon County Council, too, are actively supporting retailers through its city recovery work and helping shoppers move around the city and use the streets safely.

However, while the visible changes are currently observed in the social distancing stickers on pavements and widening of paths to aid queuing outside shops, and while retailers are installing perspex shields at the tills and putting protocols in place to manage dwell time and customer in-shop experience, the impact on Exeter's retailers is expected to go much deeper.

Exeter City Futures' Emergency Roundtable: Retail in a post-Covid City, sought to explore the widely held view that cities are changing as a result of the pandemic and what these changes mean for Exeter's retailers. From Exeter City Futures' Emergency Transport & Travel Roundtable held in May 2020, and other discussions with our Net Zero Network, considerations included:

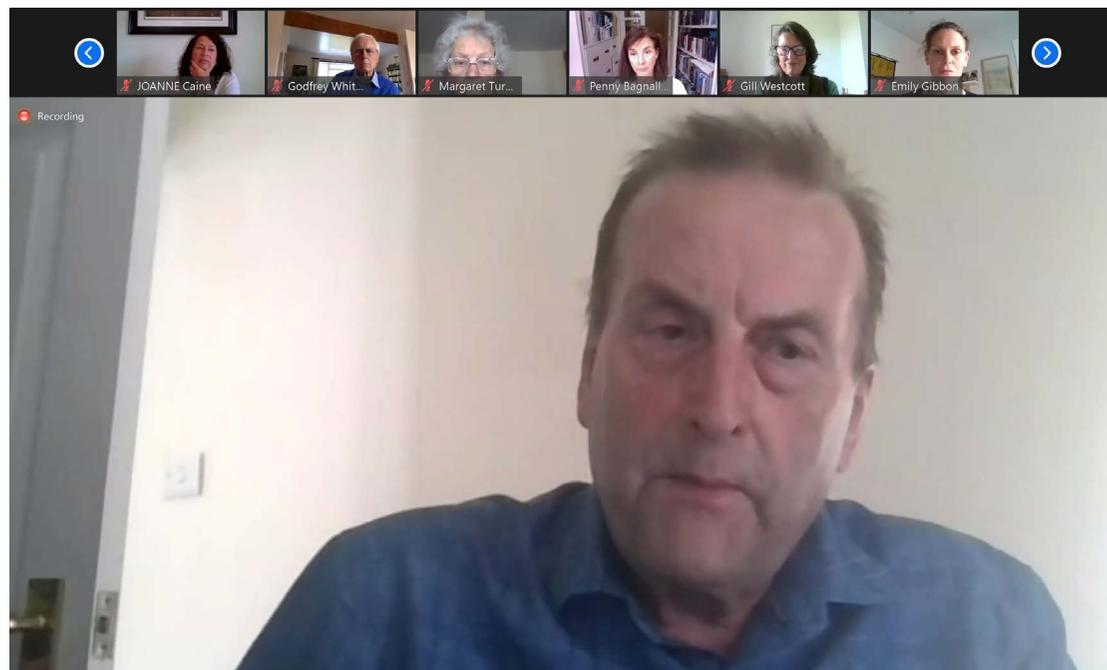
- Some Exeter businesses are predicting up to 50% of their workforce will continue to work at home, which suggests more demand for goods and services in the city's neighbourhoods, and fewer people moving through the city, popping into shops or stopping to pick up lunch
- More measures enabling people to move more easily through the city by cycling and walking (thus reducing the need for cars, alleviating the pressure on public transport) are being installed in order to satisfy social distancing requirements
- Buses were likely to transport only 20% of their pre-Covid passenger numbers
- There was a significant increase in online sales, accelerating a trend that was anticipated pre-Covid 19 - click and collect was also on the rise
- Expected job losses could affect customer spending power
- Business closures or changes in operation could mean physical changes to the high street, neighbourhoods and retail parks as some retail premises empty
- Technological developments - apps, autonomous vehicles, drone delivery – present the possibility of solutions, changes to business operation models, and differences in the way people travel into and move around the city, that previously would not have been possible.

Background

It's important, too, to ensure that Exeter remains a healthy place for its residents, workers and students, and is resilient in the face of further potential waves of Covid-19, and the spread of future diseases.

With the [Net Zero Exeter 2030 Plan](#) an integral pillar of Exeter's Covid-19 recovery, this is the opportunity to take the learnings from our current challenging situation, and turn it into creative, positive, practical action. This is the chance to take advantage of Exeter's entrepreneurial and innovative spirit, and find ways to adopt practices and behaviours that could mean the city's net zero goals are achieved earlier. Action must focus on 'what happens in 2020', not 'what should happen by 2030'.

Exeter City Futures believes the city is stronger on this road to recovery when we - residents, community organisations, businesses, and councils - work side-by-side to achieve shared goals.



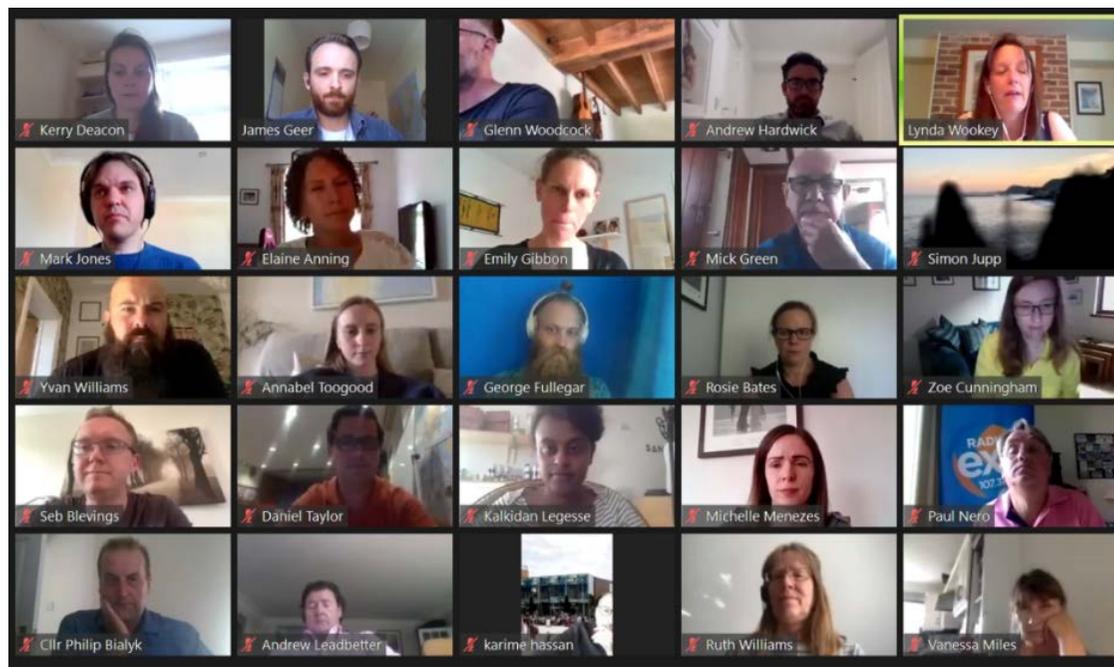
"People in and around Exeter are working hard to make sure that the city is prepared for a phased opening which starts taking place. It's going to take a little bit more than just opening the doors next week, I'm afraid. The recovery is going to be long, slow but hard and I know we can make it. I think there's the determination of everyone in Exeter to make Exeter a continued success."

Cllr Phil Bialyk, Leader of Exeter City Council.

1. The Panel

Contributors to the Panel discussion included independent retailers, representatives of nationally-known retailers, a manager of a city centre shopping centre, the chamber of commerce and city and county councillors:

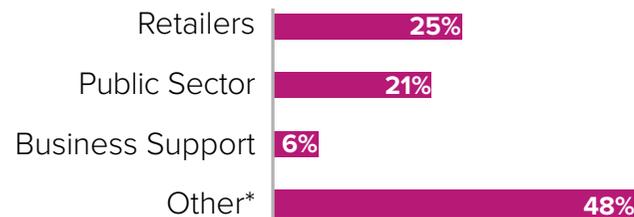
- **Simon Jupp**
Conservative MP for East Devon
- **Councillor Philip Bialyk**
Leader, Exeter City Council
- **Kalkidan Legesse**
Creative Director, Sancho's
- **Seb Blevings**
Branch Manager, John Lewis Exeter
- **Yvan Williams**
Director, Exeter Chamber of Commerce and Owner, The Oddfellows
- **Dan Taylor**
Owner of Grocer on the Green
- **Andrew Hardwick**
Former Regional Stores Director, Tesco (Westcountry) & new MD, Exeter City Futures
- **Michelle Menezes**
Centre Manager, Princesshay Shopping Centre
- **Councillor Andrew Leadbetter**
Cabinet Member for Adult Social Care and Health Services, Devon County Council (Cabinet Liaison for Exeter) and Exeter City Council



2. Poll

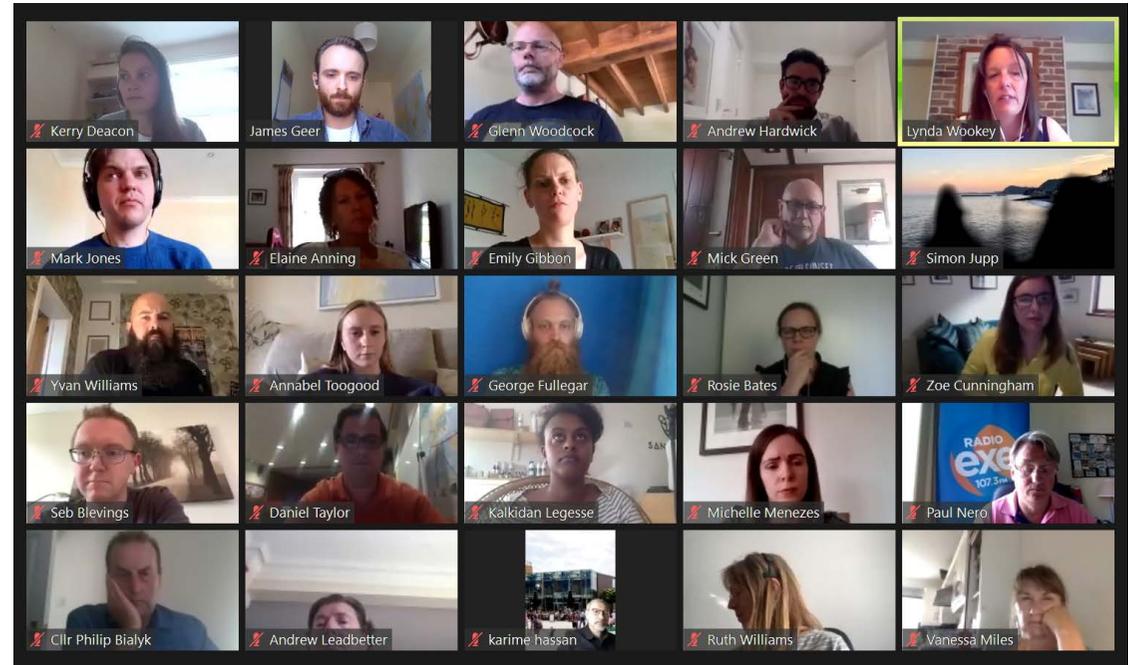
What type of organisation do you represent today?

Delegates reflected Exeter's mix of independent and nationally-recognised retailers, managers of Exeter shopping centres, retailer and trade groups and associations, the Business Improvement District, Exeter Chamber of Commerce, the Federation of Small Businesses, landlords representatives, city and county councils, businesses, the university, community groups, and residents.



*residents, community organisations, urban design, other businesses

The balanced mix of representation was achieved through the invitations that went out via the Business Improvement District, Exeter Chamber of Commerce, Federation of Small Businesses, city retail and trade groups, Exeter City Futures Net Zero Network, those who registered for the Net Zero Exeter Mobilisation Summit (cancelled due to Covid-19), the CIC's board members and their communications leads, and to the public. Members of the Exeter City Futures team were also able to knock on shop doors in the run up to the event. Eighty people registered to participate.



"Grab this opportunity, understand the threats, deal with them and advance the net zero agenda, taking businesses with you."

Mick Green, Federation of Small Business and Endorse HR

3. The Agenda

The structure and agenda for the two-hour event ran as follows:

- Welcome and introductions
- Poll: What type of organisation do you represent today?
- Panel discussions
- Poll: How confident are you now that Exeter's retail sector can reopen and thrive?
- Roundtable discussions
- Feedback
- Panel response to the Roundtable discussions
- Poll: Which of the priority initiatives proposed through the Roundtable discussions would you like to see adopted by the city?
- Summary and close



"Thank you all for an incredibly thorough and thought-provoking discussion! Looking forward to seeing all the innovative ideas put into practice!"

Participant, Exeter resident

4. Panel Discussion

The Panellists were asked to speak about:

- Their view of what Exeter looks like as the city both emerges from the pandemic and maintains its resilience, and how this aligns to the Net Zero Plan, Clean and Inclusive Growth ambitions, and the Build Back Better strategy
- What that means for their business, or those they represent, now and for their operation in the future - pre-Covid view of retail, opportunities and challenges available now, innovations to embrace
- Calls for action – what they need from residents, businesses, retail organisations, business support, communities, councils, educational institutions in the city of Exeter to ensure retail can continue to contribute to a thriving city

[Watch the full Panel discussion here](#)

Kalkidan Legesse, Sancho's, Fore St

"I think one important distinction I would make between independent businesses and larger retailers is, you know, the logistics of having people in store isn't really our main challenge. Our main challenge is how quickly we can serve as many customers as possible. If we could do that online, we could do that quickly, you know obviously that helps us grow...I think there's going to be a lot of value for the city to help develop a delivery infrastructure that businesses can tap into as and when they need it. I think you know it's been echoed earlier, but people are looking for meaningful reasons to come into town, but in order to create those reasons, we're going to have to spend a lot of money and put in a lot of energy. Whereas if we just let people shop from home and just fulfilled their orders in a much more convenient way, we wouldn't need to spend that money."

Cllr Andrew Leadbetter, Cabinet Member for Adult Social Care and Health Services, Devon County Council and Exeter City Council

"As an optimist, because I don't think our high street is dying, I think it's in a state of transition. I think that's the case with many high streets...the good points have been made which are we need a safe city centre, a clean city centre, and a green city centre, which would encourage people to come in and they're not going to be going out of town to do other things."

Seb Blevings, Branch Manager, John Lewis Exeter

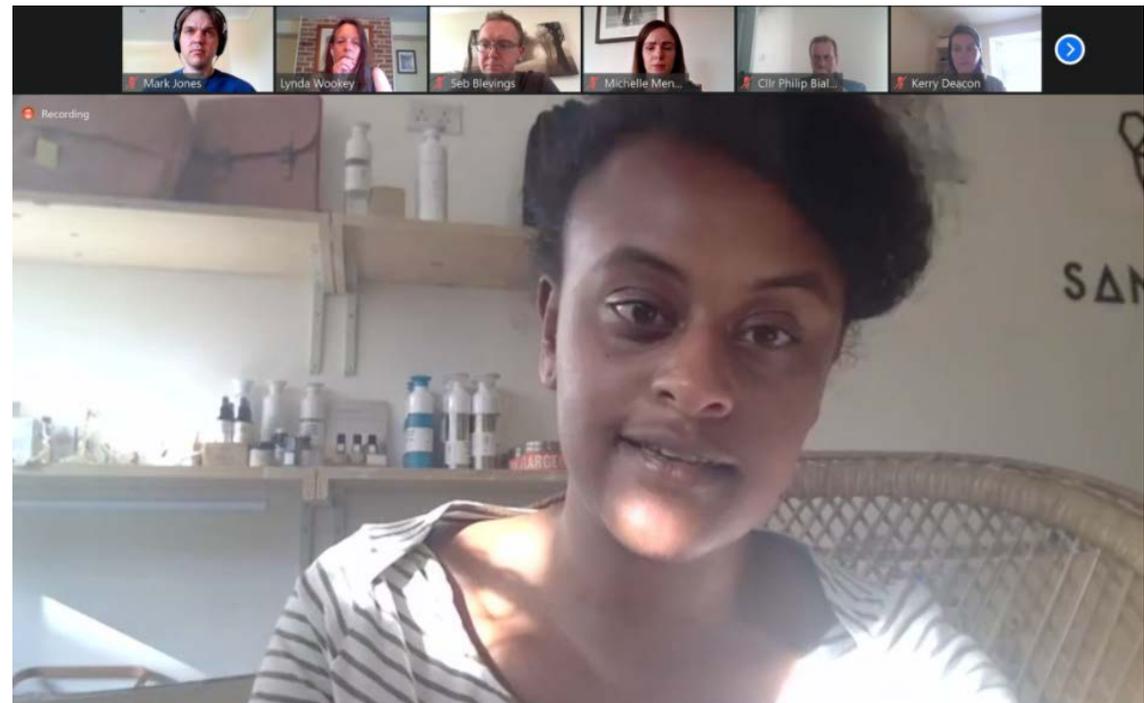
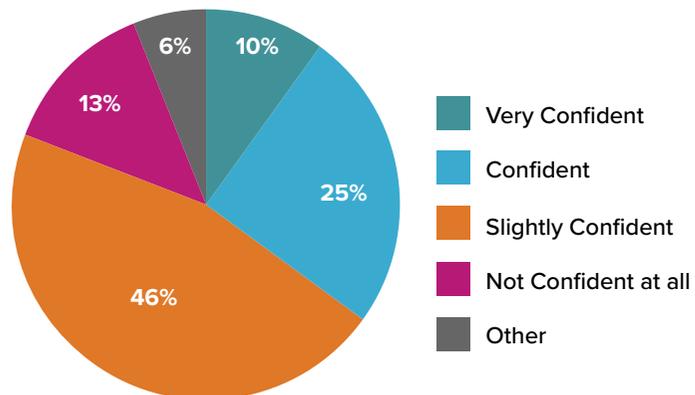
"If we're to look beyond and be optimistic, I think we've got to remember that retail was in some sort of trouble before this. I think post-Covid it's the same issues just with more urgency, so I completely agree with what's been said about you need to have a unique selling point, but assuming that people do want your goods or your services, many retailers were already thinking about what else they can do beyond that product or that service."

5. Poll

How confident are you now that Exeter's retail sector can reopen and thrive?

To gauge the initial reaction and thoughts as to the Panel's view of Exeter as it emerges from the pandemic and what that means for retail in the city, delegates were asked to express their confidence in Exeter's ability to re-start the retail sector.

Going in to the roundtables, nearly 60% of delegates recorded that they were only 'slightly confident' or 'not confident' at all that Exeter's retail sector can re-open and thrive. 35% were 'confident' or very 'confident'.



6. Roundtable Discussions

All the Panel members and delegates were split into facilitated roundtable discussions during which they were asked to consider:

- What do you feel about what the Panel has just shared and its impact on what Exeter could look like?
- How does this inform what you will do in your own businesses/organisations?
- What initiatives does Exeter need to adopt as a result of this discussion?
- Which of these initiatives would you recommend the city adopts (choose up to 3)?

[Click here to read the full summary of each roundtable's discussions.](#)

Note: the roundtable discussion document was an open document, to which people could add views post-discussion if they felt they did not have a chance to add them at the time.



7. Recommendations

Top initiatives identified for the city to address

The facilitator of each roundtable discussion was asked to feed back on their group's Top Recommendation – the number one priority initiative of the three identified by their breakout group.

[Watch the full feedback session here](#)

Roundtable 1: James Geer facilitating

- **Top recommendation:**
Place-making quick wins such as cleaning and greening, fixing litter issues, and making our streets more attractive for shoppers.
- **Recommendation 2:**
Welcome diversity into the city, this brings students and more customer spend.
- **Recommendation 3:**
Park and Change – parking hubs near bus and train stations.

Roundtable 2: George Fullegar facilitating

- **Top recommendation:**
Establish working groups with SMART targets – keep the momentum up. *“Harness this energy, this interest, and let's work collaboratively to find the solutions...let's not just talk about it, take action. People will be amenable to action now, but maybe not in six months.”*
- **Recommendation 2:**
Develop specific initiatives - help businesses become digital; support clean transport initiatives - customers into the city, goods out of the city.
- **Recommendation 3:**
Keep focussed on climate change.

Roundtable 3: Annabel Toogood facilitating

- **Top recommendation:**
The city centre needs to be more than a retail hub to attract more people – make it more pedestrianised, and more family friendly by offering more entertainment, including late night entertainment.
- **Recommendation 2:**
Look at the living space – where storerooms above shops are empty, could this space be changed to living space.

7. Recommendations

Top initiatives for action the city must address

Roundtable 4: Mark Jones facilitating

- **Top recommendation:**
Electric bike-park and cargo bike delivery network – use electric bikes to get people and cargo in and out of the city.
“Thinking about new models about how deliveries could work...If you’re unencumbered, you walk around the city centre, you can enjoy the retail experience, you can relax...It’s freeing up space for people. Covid is going to have a lasting impact – we will need more space around us, and something will have to give somewhere.”
- **Recommendation 2:**
Attractive and safe city.
- **Recommendation 3:**
More Park and Ride Services.

Roundtable 5: Andrew Hardwick facilitating

- **Top recommendation:**
Develop extra parking hubs near major bus routes and train stations – Park and Charge initiative.
- **Recommendation 2:**
Improved availability and access to public toilets.
- **Recommendation 3:**
Improved mobility options so not everything rests on the car.

Roundtable 6: Glenn Woodcock facilitating

- **Top recommendation:**
A regular themed, safe, and comfortable Exeter market day in a covered but outdoor space to develop a much stronger relationship with the community around which the other retailers could build themselves.
- **Recommendation 2:**
Delivery network for local retailers.
- **Recommendation 3:**
More clean wash spaces in city centre.

7. Recommendations

Top priorities for action the city must address

Roundtable 7: Elaine Anning facilitating

- Top recommendation:
Real time information for visitors to enable them to feel confident and safe as they return to the city.
“What interventions have been put in place for their safety... understanding why those are there; which shops are busy and which shops are quiet so people can choose where to go to feel confident; where are the open spaces; which toilets are open; timings – to give people as much information to feel safe and confident when they do come back to the city centre.”

Roundtable 8: Lynda Wookey facilitating

- Top recommendation:
Low traffic neighbourhoods.
- Recommendation 2:
Buses need to be electric or hydrogen, not diesel, powered.
- Recommendation 3:
Look for a place that can become a great social space.
“Humans are social animals, we like to gather: need Exeter city centre to offer a genuine nice experience - places for eating, drinking, socialising - biggest problem is Exeter’s biggest spaces occupied by traffic and buses - find a place to make Exeter a destination and we’d have a reason to go in, perhaps like the urban beaches. Make the city a big programmable space, something like Las Ramblas.”

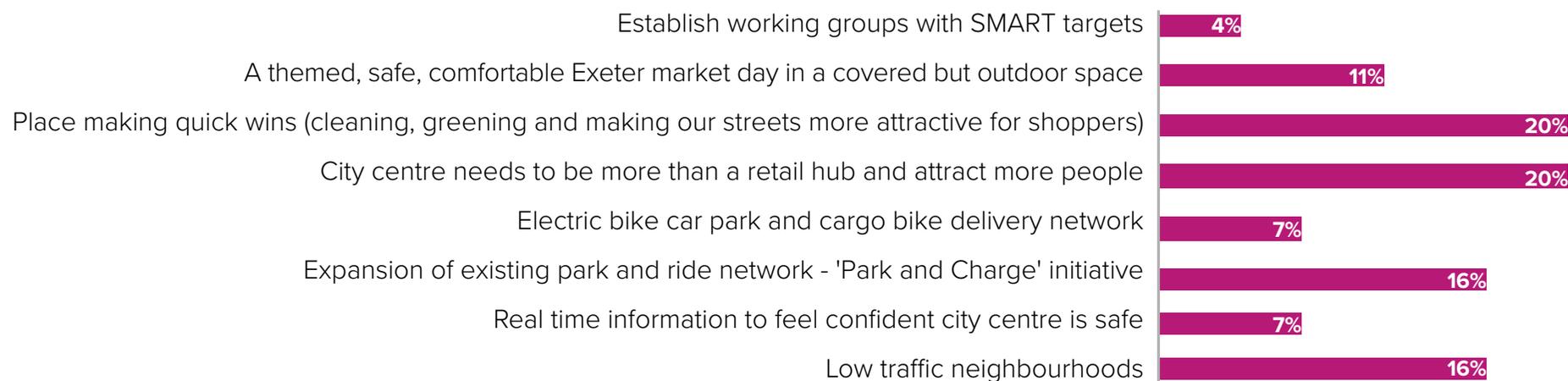
8. Poll

Vote on top recommended initiatives

Following the feedback, the top recommendations from the roundtables as to which retail initiative they would most like to see the city adopt were added to a Poll.

Asking ‘Which of these proposed initiatives would you recommend the city adopts?’ the Poll results at the end of the event showed ‘Place making quick wins’ and ‘City centre needs to be more than a retail hub’ topped the vote, each attracting support from 20% of the audience.

Which of these proposed initiatives would you recommend the city adopts?



9. Chat and its Analysis

During the online meeting, delegates used the Chat function to raise and discuss points shared by the Panel, the Roundtables and in the Feedback sessions.

Here the audience also shared their expectations for the event, and further evidenced their needs and support for the initiatives they want to see Exeter adopt in support of the city's retail sector.

Read the full chat [here](#)

The Chat content was also analysed to determine the themes arising and their categorisation.

The Chat most often fell into the categories of calls for reimagining of the retail space in Exeter, and a green, people-focused, recovery as Exeter emerges from the Covid-19 pandemic.

Here you can see how the Chat content was assigned themes:

Themes	Count
Bring back/review the composition of the city centre/convert space for housing/ pedestrian boulevard	24
Encourage walking and cycling /pedestrianisation / make Exeter people centred / improve air quality/park & rail/park and change	20
City Council supporting businesses/lower business rates/low carbon delivery/ waste disposal/improved cleaning & greening of streets/ revised revenue model	17
Net zero / green recovery and retail /localism/community businesses	16

Market town - more covered space/rotate round the city/night markets/expanded farmers markets	16
Cultural hub/experience centre/social hub/pop up repair reuse facilities in vacant units	15
Collaboration! Businesses working together to prevent vacant retail space	11
Deliveries (those businesses new to delivery)/cargo bikes/green delivery/delivery hubs	11
Experience for shoppers - create a connection/character of the city/green up the streets/encourage lingering	10
Safe, clean and green recovery	9
Improved communication/bolster confidence	4
Address accessibility issues - public transport/toilets/seating, local deliveries will help the less able	4
Council controlled public transport	3
How have businesses adapted/are adapting/online shopping	3
Improve diversity and inclusivity	3

Once the Chat content had been identified by theme, the themes were grouped to help categorise those elements attracting the most focus:

Count	Measures
55	Review and reimagine the retail space in Exeter - focus on markets, community and the city centre.
52	Green recovery and people based, inclusive interventions.
34	Interventions suggested for the Council to support businesses and improve the shopping experience.
25	Interventions and innovations for businesses to improve their offering and collaborate

10. Panel Reflection

The Panel were asked to consider the discussion and feedback, and were asked:

What has really struck you about the conversation and initiatives proposed this evening?

Simon Jupp MP:

"I think the things that really struck me was there's a real want to be very creative with our spaces, because if we have things like late night shopping, for example, themed markets using our space to enhance our experiences, it'll be something that we can really shout about as a city and as a regional shopping destination.

"...Also it was touched on in the Chat just a moment ago, but things like transport hubs - and I'm a member of Transport Select Committee - could be really crucial. So 'Park and Cycle', for example, for those who can't cycle the entire distance but can for some of it. And 'Park and Walk' and 'Park and Rail', not just 'Park and Ride' as a traditional bus system will be really interesting to explore and I think Exeter has a fantastic opportunity to do that.

"I really welcome tonight's discussion. It's been really interesting for me and I'm really looking forward to the next time I can get into Exeter to spend as much as I possibly can do..."

Seb Blevings, Branch Manager, John Lewis Exeter:

"I hope that we can get to the centre of Exeter to be pedestrianised and greener etc, but I think with the financial constraints on local central government etc, I think the only way we're going to get there is by, it's going to sound like cheesy cliché, but by working better together - large retailers and smaller independents.

"It's quite comical with some of the comments at one stage, it looked a bit like we were making a case for who had the harder time, whether the chains or independents. The truth is everyone is facing their challenges and I think we have to face into the reality that we are over-shopped.

"The final picture, at least for the centre of Exeter, will look like it has fewer shops and that's probably maybe a good thing. For the very best to survive, and for it to be the best environment for us and the people who visit it and live and work there, we've got to work better together."

10. Panel Reflection

Andrew Hardwick, MD, Exeter City Futures:

"There's been lots of great ideas, lots of discussions and from all different types of businesses, different retailers, big, small and everything in the middle, which has been really useful.

"In terms of my takeaways, I would say there's some real stand-out themes that have flowed through many of the contributions. One would be technology and deployment of technology, whether that's tapping into the growing online presence, whether it's through delivery bike services, electric bikes or existing technology that's out there such as Deliveroo, that sort of thing.

"Collaboration has come up a lot, which is really, really, encouraging. I think it's definitely a by-product of the pandemic. Where often it always seems like 'it's a competitor and I have got to keep all my secrets' and that's the sort of competitive nature in the world we often operate in, I think what Covid-19's done has actually tractioned we can work together and share best practice and I think that flowed through many contributions. It is now about how do we take the collective learnings and come up with shared solutions, so that's very, very, interesting.

"It is also the balancing of the experiential experience for people coming into the city and people coming to shop and balancing that around making sure there aren't big customer irritants of long queues and no toilets and you know absolutely excelling at clean, easy, experiences. That really stood out for me.

"Then it's how do we actually enhance that around better training, better levels of service, more options and innovation with the market. That's the bit I'm taking away - there's some real clear levers that featured in most of the contributions that were shared.

"This has been a really good start, but I think you need those immediate ones, the next 6 months to a year, then you need the long term as well."

Watch the full panel reflection [here](#)

11. Next Steps

The work of delegates and Panel at Exeter City Futures' Emergency Retail Roundtable has already prompted action:

1. Retail initiatives collated for sign up

The retail community initiatives most recommended for adoption in Exeter by the Roundtable participants (as outlined earlier in the report) have been collated. These top recommendations will be circulated to those who registered to participate in the Roundtable and amongst the wider Net Zero Network with a call for people and organisations to sign up where they are willing to commit to taking particular initiatives forward. Exeter City Futures will then seek to facilitate the early development of the emerging working or project groups.

2. Retailers network

Feedback received from retailers attending the Emergency Retail Roundtable indicated that they would like to see more retailers involved in taking the initiatives forward. A review of how retailers were able to engage in the Roundtable and have been engaged with in similar activity to date suggested that an additional, online, channel of communication could be beneficial in the flexibility it will offer in enabling retailers to develop these important relationships. With thanks to the Federation of Small Businesses, Exeter, and supported by founding members including the Business Improvement District, Exeter Chamber of Commerce, Exeter City Council, John Lewis Exeter, Princesshay, and Saddles and Paddles, a retail Slack channel has been launched as a branch of the FSB-led Exeter Business Advisor network.

The aim is to support open conversation and collaboration amongst retailers, to help connect with them, and to help businesses connect with a wider community, echoing the need for more working together and the growing importance of Exeter's communities to the city's retail sector as profiled by the Roundtable discussions.

Exeter retailers of all shapes and sizes are encouraged to join the Slack channel. Please email l.wookey@exeter.ac.uk for your invitation link.

3. Travel and customer spend survey

Interest in the recent travel measures enabling better social distancing and how they impact on customer ability to reach Exeter shops, has also grown since the Roundtable. As a result, Exeter City Futures is working with Devon County Council, Exeter City Council, the Federation of Small Businesses, the Business Improvement District, Exeter Chamber of Commerce, and retailers to develop a survey that can be used to monitor trends, support retailers in running their business and help inform city strategy.

11. Next Steps

There is more to come soon, and not only as a result of the initiatives identified during the event. One of the clearest understandings to emerge from the Emergency Retail Roundtable is that much of what was examined during the event is not any different to what was being considered in Exeter pre-Covid. It is the way in which it has come about, how much there is to think about all at once, and how much sooner it must be addressed, that is the challenge.

Plans and actions discussed around retail are also heavily interlinked with the conversations happening in Exeter around how we travel, our communities, homes, workplaces, data, food, tourism, culture, funding, clean air, our health, energy, and more.

This a complex landscape, but, primed by the Net Zero Exeter 2030 Plan, not an unfamiliar one, and one where we know a win in Exeter's retail community will have a positive effect in another part of the city. Imagine an e-cargo delivery scheme in Exeter that frees up roadspace and results in cleaner air, while allowing city retailers to increase their customer base. For those who travel into and around the city to shop, think how you, your friends and family could enjoy the cleaner, greener, more exciting spaces made possible by less traffic, cleaner buses, wider pavements, and a city that offers more than just a retail experience.

As was also made abundantly clear through many representations at the Emergency Retail Roundtable, Exeter is a place where these great things can be achieved. We must grasp the entrepreneurial spirit that is present across the city and seek to harness collaborative and innovative ways of seizing the unique opportunities that the Covid-19 pandemic has presented.





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