A Destination Management Plan for Mid Devon

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1.0 Background – Why a destination management plan?

The Council and its partners would like to see a competitive and sustainable tourism sector, but to achieve this there needs to be an agreed way forward and co-ordination between partners. Our aim is:

> **To build a competitive and sustainable tourism industry for Mid Devon, which increases the contribution tourism makes to our local economy over the next 5 years.**

Tourism is a key sector for the District's economy, creating jobs, increasing expenditure in the local economy and generating new business ideas. Tourism as defined by the World Tourism Organisation is any 'activity undertaken by persons travelling or staying in places outside of their usual environment for not more than a year for leisure, businesses and other purposes.' Sustainable tourism is committed to generating a low impact on the surrounding environment and community while generating income and employment for the local economy.

A destination management plan is a shared strategy showing the intent of partners to manage, develop and promote the area as a visitor destination. It is very much a partnership document as it is not possible for any one organisation to achieve everything on its own as it touches all aspects that contribute to a visitor's experience.

2.0 Economic Impact of Tourism - current situation

2.1 Mid Devon Economic Status – performance and impact

Tourism is recognised as an important driver of the Mid Devon's economy. It contributes significantly through job creation, increased expenditure and income into local communities.

In 2015, Mid Devon attracted approximately 212,000 staying visitors from the UK and overseas combined with approximately 1.59 million day visits, generating an estimated £101 million pounds worth of visitor spend in the local economy. Approximately 1,500 full-time equivalent jobs within the district are working directly in tourism related businesses, representing 5% of all employment in Mid Devon.

Key facts – Value of tourism 2015	
212,000	Staying visitor trips
860,000	Staying visitor nights
£43,165,000	Staying visitor spend
1,589,000	Day visits
£52,909,000	Day visitor spend
£96,074,000	Direct visitor spend
£5,059,000	Other related spend
£101,133,000	**TOTAL VISITOR RELATED SPEND**
2,084	Estimated actual employment
1,505	FTE employment
5%	Proportion of all employment

Table 1. Highlights from The economic impact of Mid Devon's visitor economy and evidence base 2015

Mid Devon is the least visited district in Devon, indicating there is plenty of room for growth.

Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's	Domestic spend (millions)	Overseas spend (millions)
East Devon	478	43	1,905	332	£100	£17
Exeter	423	58	1.446	631	£86	£37
Mid Devon	193	19	727	133	£37	£6
North Devon	937	56	4,205	364	£224	£20
Plymouth	637	76	2,186	616	£114	£33
Teignbridge	573	38	2,488	261	£119	£13
Torbay	1,084	96	4,033	563	£274	£36
Torridge	237	19	1,006	144	£53	£7

Table 2 from The Economic Impact of Mid Devon's Visitor Economy and Evidence base 2015.

The main reason why domestic visitors come to Mid Devon (day trips and staying) is for a holiday or leisure time. While for overseas visitors the main reason is to visit friends and relatives. This is significant as it means that having local connections is an important motivator even for overseas visitors.

The largest direct spend for day visitors and for domestic staying visitors (after accommodation costs have been considered) is on food and drink, with shopping being a significant second and the most significant spend for overseas staying visitors.

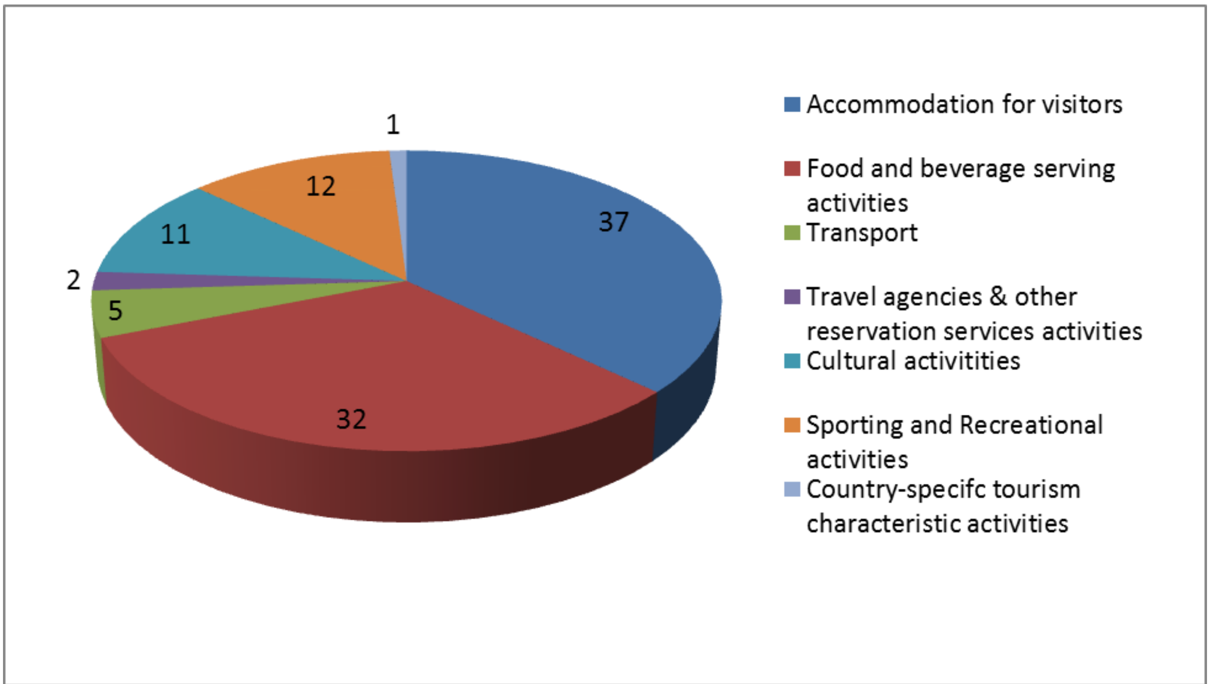
Food & drink	Domestic staying visitors £8,241,000 Overseas staying visitors £1,438,000 Day visitors £21,965,000
Accommodation	Domestic staying visitors £13,518,000 Overseas Staying visitor £1,611,000
Shopping	Domestic staying visitors £4,684,000 Overseas Staying visitor £1,948,000 Day visitors £17,072,000
Attractions / entertainment	Domestic staying visitors £4,012,000 Overseas Staying visitor £779,000 Day visitors £7,170,000
Travel	Domestic staying visitors £6,301,000 Overseas Staying visitor £634,000 Day visitors

	£6,701,000
Second Homes	£180,000
Visiting Friends and Relatives	£4,879,000

Table 3 from The Economic Impact of Mid Devon's Visitor Economy and Evidence base 2015 report.

3.0 Mid Devon's Tourism Offer

Accommodation and food and drink providers make up the majority of businesses working within the sector[1], while travel and country specific activities such as conferences, exhibitions and fairs are the lowest. However, business codes do not distinguish tourism-related retail businesses to other more general retail businesses – so it hard to evaluate the significance of retail to the tourism offer.



Graph 4. Share of tourism sectors within the industry by number of businesses using the tourism SIC codes from the Mint Database Nov 2016.

3.1 Accommodation

The latest available information on accommodation for Mid Devon estimates that there are a total of 195 accommodation providers in the district, offering over 3,100 bed spaces of various kinds. There is a lower concentration of accommodation to the west of the District, especially around Crediton.

	Bed spaces / pitches
Hotels	629

[1] Mint Database of Registered Businesses 2016

Guesthouse	66
Inns	119
B&B	557
Farms	88
Self-catering	170 units
Touring caravans / tents	378 pitches
Static vans	28 pitches

Table 5 Accommodation breakdown for Mid Devon from the Economic Impact report 2015.

Poor weather can have a negative impact on campsite bookings. However, glamping type accommodation (yurt and tepees) have increased in popularity in recent years, providing high quality experiences for people looking to get closer to nature. This type of accommodation requires advanced booking so providers are able to rely on numbers throughout the year, and extending the traditional holiday season.

As one would expect, the majority of the accommodation stock is in the countryside, however, there are also very few town centre hotels or B&B's.

3.2 Attractions and local offer

There are 14 paid visitor attractions in the district, offering a variety of activities for visitors. Attractions include museums, boat trips, historic houses, castles, theme parks, vineyards, and animal watching. There is a lower concentration of paid attractions to the west of the district.

The local offer is much wider than attractions; the district's natural environment (the countryside - stunning views / landscape / valleys) and a rich cultural heritage make Mid Devon a beautiful and interesting destination. Green infrastructure (footpaths, bridleways, cycle routes), heritage sites, churches, quaint villages, 11 miles of the Grand Western Canal, listed buildings, conservation areas, access to Exmoor and the Blackdown Hills AONB, rivers & 200 country wildlife sites all contribute to the local offer. The area has a variety of food and drink establishments serving local produce.

There has been a recent growth in the number of conference and event venues within the District, particularly wedding venues. These can offer both a venue for a day event, but increasingly offer accommodation for overnight / weekend events as well. There is also a strong country sports offer, with a concentration of coarse fishing lakes and associated accommodation in the Culm Valley, and fly fishing in the Exe Valley. While, on the Exmoor Fringe, game shooting is a key pursuit with local shoots providing world class game bird shooting and attracting high-spending visitors who contribute greatly to the economy, community and environment of the area.[2] Equestrian holidays are another visitor attraction particularly on the edge of Exmoor and the Blackdown Hills.

4.0 Who comes to Mid Devon?

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[2] PACEC on behalf of Exmoor NP (2012) "The Role of Game Shooting in Exmoor, Final Report", Exmoor NP, available at http://www.exmoor-nationalpark.gov.uk/__data/assets/pdf_file/0006/271653/GESAPACECreport231006-3.pdf

The findings from the 2016 visitor survey portray a positive and encouraging picture of Mid Devon as a tourism and leisure destination in the South West region. The headlines from the survey include:

- Mid Devon is predominantly a destination for day visitors.
- The main visitor market appears to be those people living within the immediate South West region.
- Mid Devon appeals to adult-only groups with visitors falling into the middle (45-54 years) and older (55+ years) age groups.
- The average group size is 2.85 people
- The majority come to Mid Devon for leisure purposes or for visiting friends and family.
- Overnight visitors spend on average 4 nights
- Mid Devon attracts a relatively affluent visitor market (social grades ABC's)
- The district attracts a high proportion of repeat visitors across all visitor types. This is likely to be due to the fact that visitors to the district appear to be relatively satisfied with the visitor experience and the tourism product on offer to them when making a visit.
- The main reason for their visit is to eat out (food and drink), followed by shopping, walking, visiting family attractions and enjoying the countryside
- Visitors use the internet during their visit to source information from google, Trip Advisor, Visit Devon and Heart of Devon. However, a high proportion still likes to use a brochure or leaflet during their visit.
- The lowest satisfaction rates were for nightlife/evening entertainment and availability of public toilets.
- Standard questions are used to benchmark the overall satisfaction and enjoyment of a visit, for example visitors were asked the likeliness of re-visiting the area and 4.73 out of 5 (very high) would return.
- A similar benchmark is recorded through a recommendation score. Mid Devon's recommendation score was +42%, which is good but slightly lower when compared with the score for the county as a whole of +56%.
- Some quotes why people like it here: 'the countryside', 'a lot calmer and laid back', 'Atmosphere, scenery and peaceful', 'accessibility to coastlines in Devon', 'variety of things to do', 'friendliness', 'Weather, fresh air and wild flowers along the paths'.

5.0 Partnerships and Marketing

Mid Devon used to be marketed under the Heart of Devon (HOD) Area Tourism Partnership (ATP), together with Exeter, East Devon and Teignbridge. However, in January 2016 the Heart of Devon partnership merged with Visit South Devon (VSD). Following this merger Mid Devon businesses were struggling to relate to VSD's strong coastal brand and many have now migrated to Visit Devon.

Visit Devon has been developing to become the 'go to' company for tourism and hospitality businesses located in Devon. Over the past 12 months they have appointed a new board, introduced a new membership structure and a completely revamped their website. Visit Devon is a Community Interest Company and will be working on behalf of the tourism and hospitality industry locally to promote Devon within the UK and overseas to attract new and additional visitors to the county.

Up until recently Mid Devon has been under represented on Visit Devon's website, but this has been addressed. Events can now be promoted through the website, however there is a lack of locally co-ordinated promotional campaigns at present and there is no central website for Mid Devon to direct visitors to.

Mid Devon Attractions Association is an important private sector led group for the area. Their objectives are a) to be a voice for Mid Devon and b) to promote the area by working in partnership on a number of projects and promotional campaigns e.g. identifying a brand for the area and creating a marketing and promotional strategy. MDDC is supporting the group to become an influential body with its own marketing and events programme and an organisation for securing external funding for future marketing campaigns.

Mid Devon District Council part funds the Tourist Information Service (TIS) which has created networks with accommodation and attraction providers, releasing a monthly e-bulletin to businesses. The TIS maintain some of the 'Explore Tiverton' web pages which promotes local events, accommodation and 'things to do'. Cullompton and Crediton do not have a similar website to promote their towns. There are no overall accommodation or food and drink partnerships in the area.

As it stands marketing and promotion for the area is done on an individual business basis, very little joint advertising campaigns / schemes have taken place with no clear leadership or coordination across the district and sectors. Mid Devon as an area is unknown and requires a clear brand to re-position it within the tourism market. There seems to be a concentration around what the area doesn't have e.g. coast / National Park rather than focusing on what the area does have to offer, creating one clear message which the sector adopts. A clear brand and unique selling points need to be identified to promote the area and re-position it as a competitive area to visit.

6.0 Mid Devon's product offer

Below is a SWOT assessing the strengths and weaknesses of the local offer and the opportunities and threats from external influences (PEST analysis).

	Strengths	**Weaknesses**
Visitor	• Visitor loyalty – high levels of satisfaction and repeat visits. • A place where visitors feel safe and secure • Attracts a large proportion of local, South West residents.for day visits within a relatively short drive time of the area. • Attracts relatively affluent visitor market with a good recommendation score.	• Lack of range of nightlife/evening entertainment • Doesn't attract younger visitors • Majority of visitors don't use social media while on their visit, therefore little free publicity is generated. • District is not capitalising on short break market and extending the tourist season • Visitors don't know they are in Mid Devon
Product	• Tourism related employment is 5% • Good quality accommodation • Strong heritage offer in Tiverton, Cullompton and Crediton • High number of conservation areas • Attractive towns and quaint villages set within valleys creating stunning views • Peace and tranquillity – pure get away. • Strong potential food offer, pubs, restaurants, food festivals, farmers	• Limited public transport options across the district especially on Sunday's and bank holidays • Perception that Mid Devon has nothing to offer young people and families • Limited mobile and Wi-Fi connection across the district • Lack of events in off peak seasons • Uneven spread of attractions throughout the District. • Little paid attractions in Crediton and

	markets, local producers. Award winning food events. • Diverse product offering, e.g. quaint villages, market towns and historical buildings, rivers, canal, visitor attractions • Official walking routes (GWC, Exe Valley Way, Little Dart Ridge Valley, Devonshire Heartland Way, Tarka Trail) and cycling (Sustrans networks – routes 3 & 344) • A number of key assets including Crediton Parish Church, St Boniface Catholic Church (National Shrine of St. Boniface), Crediton High Street – independent / unique, Eggesford Forest, Fursdon House, The Waie Inn, Bickleigh (Mill, Devon Railway Centre, Castle), Great Western Canal, Horse Drawn Barge, Knightshayes, Mid Devon Museum, St Peters Church, Tiverton Castle, Bampton Heritage Centre, Bampton Moat, Coldharbour Mill, Quad World, Diggerland, The Bear Trail, Devon Badger Watch, Downe House, Yarak Birds of Prey.	surrounding area. • Gaps in assets – no farm type attractions, • Limited low cost accommodation e.g. camp sites.
Place	• High quality countryside & natural environment • Easy access by road and rail. Good transport links, with the M5, North Devon link road and main-line railway running through the District. • Potential to develop major visitor attraction at J27 of regional significance • Close proximity to the moors, beaches, city, AONB • Active Town Teams in Cullompton, Crediton and Tiverton developing the local offer. • Recent review and update of brown signs	• Tourism businesses rely on the typical seasonal months, not seen as an all year round destination • No investment is planned for green infrastructure including cycle paths, long distance footpaths, rural footpath signposting, linking up routes. • Perceived as a gate way to Devon e.g. a pass through area.
Promotion	• Good business reviews on Trip Advisor • Award winning accommodation, attractions and events • Mid Devon Attractions have formed an Association working towards marketing and promoting Mid Devon. • Active TIC for Tiverton and information points in Cullompton and Crediton • Robust statistics and volume & value trends data for the area	• Lack of profile across Devon, UK and overseas • Least visited destination compared to all Devon districts • Multiple businesses and agencies advertising the area – no clear message or branding • No clear direction of the districts USP's. • Lack of communication channels with the business sector e.g. no accommodation association for the area

		• Large and diverse area to administer. • Lack of online presence to promote towns, attractions and accommodation • Businesses express that they can't relate to the Area Tourism Partnership – Visit South Devon brand which Mid Devon falls under. • Attractions are small scale and can't afford membership fees. • Lack of communication channels through our towns and villages to promote our highstreets, events and activities. No one event calendar. • Not all businesses are social media mature
	Opportunities	**Threats**
Political	• Tourism is a growing industry in its own right and it makes an increased contribution to the economy • Visit England's Strategic Framework for Tourism 2010-2020 / Governments Action plan (Aug 2016) • Potential to unlock funding through LEP • Councillors' decisions – cascading information to Parish/Town Councils, businesses and trade • Political support to develop a train station at Cullompton • Political will to investigate the Exe Valley AONB • Develop stronger links with nearby areas • Government plans to cut red tape by changing licenses for B&B's.	• Decreasing industry ATP membership following HOD/ VSD merger • School term time holiday-taking regulations
Economic	• Business collaboration on consumer offers and promotions • To increase the overnight stays through suitable product development • Scope to market Mid Devon as a whole • Tourism in the UK is set to grow by 5% year on year which will generate new demand with corresponding impact on jobs and economy (225,000 jobs). • Leisure and tourism development for J27 could create opportunities for advertising & promotional links with our town centres, attractions & accommodation. • New product development and campaigns • Expand the events season • To create a SLA with the TIC. Scope	• Competition from other destinations managing tourism more effectively • The true impact of Brexit on visitors and private sector spend and investment is unknown • Future developments at J27 could have mixed impact on other tourism businesses. • Interest rates and the effect on disposable income • Value of GBP against other major currencies e.g. relative weak / strength of the pound and the effect on overseas visitors • Rate of inflation

	to improve communication channels across the district and project development. • Visit Devon will be promoting the county creating marketing opportunities for businesses • Capitalising on product development, e.g. arts and crafts, cycling, walking, bowling and golf, special events (Festivals) • Encourage investment e.g. hotels • Emphasise for all year round marketing of tourism • Encourage investment in all day attractions e.g. linked attractions (multi-ticketing around attractions) • To secure Cullompton Heritage Lottery grant • Funding through the LEADER programme • Unsaturated sector plenty of room to develop • Improve access to rivers and the environment with better footpaths, bridleways, cycle ways, interpretation, viewing facilities. • Joint marketing with other councils/partners • Need a 'wow' factor for the area • Relative weak / strength of the pound and the effect on overseas visitors • Job creation • Income into the economy • Public/private partnership funding • Eligibility to European funding	
Social	• Devon as a region is known as a holiday destination. • Capitalise on Devon marketing. • Social demographic changes (older UK population) • Holiday trends e.g. increase in staycations • Country holidays are popular with over 45's • Changes in family patterns	• Customer expectations are changing rapidly • Shifting values in society
Technology	• Make it easier to find useful information about planning a holiday • Web marketing and on-line booking opportunities • Destination management systems • Increasing role of social media	• Access to Internet and Wi-Fi discrepancy's across the district

Table 6; SWOT and PEST analysis of the Mid Devon Tourism Sector

7.0 Current Trends

7.1 National Trends

A Strategic Framework for Tourism 2010-2020 (Visit England) states Tourism in the UK is set to grow by 5% year on year, which would generate new demand with corresponding impact on jobs and economy (estimated 225,000 jobs).

However, the impact of Brexit on the tourism industry is unknown. Changes to border controls may influence visitor's decisions inbound and outbound. It may result in a greater increase in staycations for domestic visitors, especially if the pound is weaker. The state of the pound will influence international visitor's decision to holiday here, making it good (if the pound is weak) or poor (if the pound is strong) value for money, and equally limit UK residents visits abroad.

In 2015, British residents took 102.7 million overnight trips in England, totalling 300 million nights away from home, with an expenditure of £19.6 billion (a new high). £191 was spent per trip, and with an average trip length of 2.92 nights, the average spend per night was £65. The number of domestic trips was 11% higher than in 2014, and the amount spent increased by 8%, reaching an all-time high in nominal terms. Overseas trips to England increased by 5% compared to 2014 to £36.1 million and spend by 1% to £22.1 billion. During 2015, GB residents took a total of 1,525 million Tourism Day Visits to destinations in England, Scotland or Wales, falling by -4% compared to those taken in 2014 (1,585); and around £54 billion was spent during these trips which remained unchanged year-on-year (£53.8 billion in 2014) (South West Tourism Research 2016).

However, with over 50% of international visitor spend still in the capital, there is more to be done to rebalance the sector, boosting jobs and growth right across the country.

Visit England has also produced a 'Rural Tourism Action Plan'. The report aims to improve the potential of the rural tourism offer and bring benefits to local communities and economies. The report proposes the following to diversify and enhance rural tourism:

- Develop existing and new visitor activities and experiences that are less weather dependent, appeal to visitors throughout the year and reflect and support the local area;
- Develop traditional and new low impact and low carbon products and experiences in rural areas informed by consumer trends and behaviours (e.g. walking, cycling, glamping, tepees, yurts, camping huts and shielings; slow tourism; outdoor concerts; museums and parks at night) and suited to local environments and communities; and
- Increase the promotion of England's rural offer and experiences by using new media and other marketing techniques to engage younger audiences.

7.2 Regional trends

The South West Region – 2015

According to the Visitor Survey 2015, the South West saw a 5% increase in trips of more than one day for UK visitors, with an increase of 7% for nights and 5% for spend. Overseas visitor trips to the region increased by 2%, nights increased by 9% and spend by 3% compared to 2014. Day visits to the South West are estimated to have decreased by 2% and day visit spend increased by 2% compared to 2014. Visits to urban areas increased by 1% with expenditure increasing by 13%, visits to rural areas decreased by 8% with expenditure decreasing by 9% and visits to coastal areas remained at a similar level to 2014 although expenditure decreased by 10% (South West Tourism Research 2016).

The latest data shows Devon's staying visitors tend to spend within the typical seasonal months (June to September high season) with a slight secondary peak in May.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	25.9	53.1	62.7	42.9	112.1	95.6	192.2	299.1	96.8	88.0	49.9	57.4
OS spend (mn's)	5.7	7.6	9.9	11.6	20.0	17.5	29.6	37.3	18.7	12.9	9.5	14.7
Total spend (mn's)	31.6	60.7	72.6	54.5	132.1	113.1	221.8	336.4	115.5	100.9	59.4	72.0

Graph 7: Estimated seasonality of staying visits in Devon – South West Tourism Research 2016

Devon is the most visited region in the South West for day and staying visits for domestic trips. However, Former Avon (which includes Bristol) is significantly higher for overseas trips.

8.0 Planning Policy

8.1 The National Planning Policy Framework (NPPF)

The National Planning Policy Framework (NPPF) was published in March 2012 and states local plans must: "Support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres." (Paragraph 28)

8.2 Mid Devon's Local Plan Review

The proposals of the Local Plan Review are that:

The Council will use planning and related powers to support sustainable economic success through:

- A good range of jobs in urban and rural areas
- Growth that respects Mid Devon's relationship with Exeter and Taunton
- Profitable and expanding local businesses, attracting inward investment.
- Attractive, lively and successful town centres
- Tourism and leisure enterprises that benefit the whole district
- Recognition of the role of heritage as a tourism attraction[3]

[3] Mid Devon Local Plan Review 2013-2033

Junction 27, M5 Motorway
"Development will be targeted to provide a high quality tourist and leisure focused development to meet needs identified within the tourism study[1]".

Policy DM22 - Tourism and leisure development within the Local Plan.
"Proposals for new or expanded tourism, visitor or leisure facilities will be supported within or adjacent to defined settlements. Elsewhere, the nature of the proposed development must justify a countryside location and minimise environmental impacts, avoiding an unacceptable traffic impact on the local road network. Development proposals must:

a. Respect the character and appearance of the location
b. Where appropriate, involve conversions or replacement of existing buildings; and
c. Demonstrate that the need is not met by existing provision within nearby settlements[1]".

9.0 The Future for Tourism in Mid Devon

Having looked at all the available evidence and consulted with sector representatives, the destination plan identifies three key areas for development:

9.1 Working in partnership

Effective partnerships are key to achieving the aims of this plan, as many organisations, both in the public and private sector, have a role in creating the right environment for growth in the tourism sector. These partnerships need to be business led, as they are the driving force for growth, but there is a role for public bodies to facilitate the process. Through partnerships we hope to develop:

- *Clear leadership and co-ordination within the sector*
- *Strive for quality*
- *A joint and co-ordinated approach to marketing and promotion*

Clear channels of engagement are needed between different bodies in order to promote and create projects, events, schemes, and initiatives which in turn can be promoted through the Area Tourism Partnerships.

Organisation	Roles
Lead partnerships – Mid Devon Attractions Association Visit Devon Visit South Devon TIC	 Represent Devon tourism at a national level Gathering evidence and monitoring Visitor information Developing the area brand and marketing Sector engagement Promoting funding opportunities Build strong partnerships Promotion
MDDC & DCC	Public realm – appearance and maintenance Planning development Public health and safety Visitor services – car parking, public toilets,

	cleanliness Partnerships with private sector Business support Transport planning and infrastructure Access, right of ways, countryside management Licensing Conservation Leadership – encourage / facilitate partnerships
Town and Parish Councils	Neighbourhood planning Place making Local activities and events Promotion
Town Teams / forums	Place making Events / improving the local offer Streetscape
Business Groups and Chambers of Commerce	Supporting tourism-related businesses Supporting the vibrancy of our town centres Supporting joint initiatives
Local Enterprise Partnership	Funding for businesses Sector support
Private sector individual tourism businesses (attractions, accommodation, retail, pubs, restaurants, car hire etc.)	Product development and investment Visitor experience – feeling welcomed Links to destination branding and promoting the area Place making Creating and maintaining employment
Local land owners	Future development opportunities Festivals and event locations Access
Heritage groups, arts & culture, civic society, sports and community groups	Local knowledge and expertise Events and initiatives Create an identity

Table 8: Organisation roles and responsibility

9.2 Clear branding and a joint approach to marketing

Mid Devon suffers from a lack of a clear identity, poor ‘brand recognition’, and inadequate promotion. Basically, visitors don’t know we are here or what we have to offer. Work must be undertaken:

- *To create an identity for Mid Devon.*
- *Ensure the sector as a whole adopts the branding and promotes the same message*
- *Create a voice for each sub-sector e.g. attractions, accommodation, food and drink, events.*
- *Identify joint promotional initiatives*

Mid Devon Attractions Association[4] have been progressing with developing an identity, securing external funding to achieve their objectives. The same model could be used to create similar identities in the remaining tourism areas e.g. food and drink and accommodation which could feed into the ATP's and link with the other local sectors. Town Teams are established in Cullompton and Crediton at present, and have an important role in developing the identity of place, but don't feed into the ATP's. There is a gap for a Mid Devon wide organisation to collate all the relevant information which can feed into Visit Devon and co-ordinate a clear brand / message for the area.

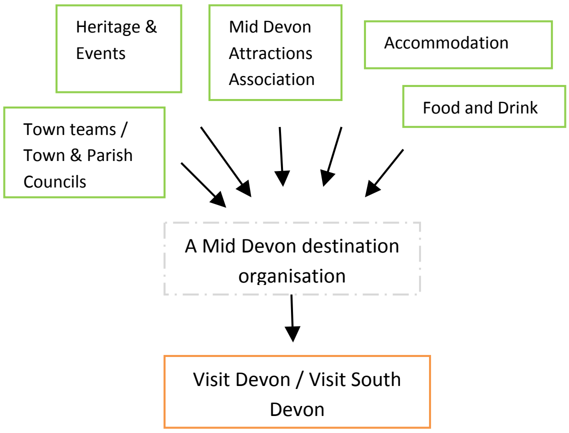

Diagram 10: Potential communication channels (groups) and promotional development links.

9.3 Creating a competitive product

- *Improve the visitor experience*
- *Meet target segment needs*
- *Develop the local offer and create new initiatives / products which will meet segment needs*

Creating a quality experience for visitors must be at the heart of all that we do as businesses and as public bodies involved in promoting the area. In order to do this we need to be aware of the needs and wants of different segments of the market.

Visit England have identified five segmentation of domestic tourists based on different needs, attitudes and behaviours (Project Lion 2016).

Segment & no. of holiday's a year	Priorities in choosing a holiday	Attitudes to a holiday in England	On their recent trip…	Behaviour
Country-Loving Traditionalist 2.3 holidays a year	1. Unspoilt countryside 2. Clean and tidy environment 3. Opportunities	1. Offers a wealth of cultural experiences 2. Makes you	1. Typically a countryside break for two 2. Half will book direct through the	1. Higher than average consumption of broadsheets and UK tourist

[4] A business-led group of visitor attractions working in and around Mid Devon.

	to eat/drink local produce	feel connected to the country's history and heritage 3. Has beautiful countryside 4. Ideal place for people like me	accommodation provider 3. Two thirds prefer to stay in a b&b for the personal touch or rented accommodation 4. Spent time exploring the countryside and small towns	websites 2. Likely to live in East / Anglia and South East 3. Married or living with partner with no children 4. £20-45k income bracket
Fun in the Sun 2.0 holidays a year	1. Good range of outdoor activities	1. Good for families with kids 2. Good beaches 3. Makes me want to return 4. Sense of excitement and adventure 5. Is fun 6. Good for young people 7. Feels like a proper holiday	1. Typically seaside break for at least 3 people 2. Over a third will stay in a caravan or holiday camp 3. Seasonal holidaymaker 4. Spent time at the beach, shopping and exploring small town	1. Strong users of social media 2. Like to live in West and South West 3. Majority married or living with partner, half with children and aged 35-55years. 4. £20k-£45k earner
Fuss-Free Value seekers 2.2 holidays a year More likely to consider England for a holiday or short break	1.Easy to get around by public transport 2. A destination that is easy to get to by public transport 3. It doesn't take too long to get there 4. Deals and discounts for the destination	1. Is good value 2. Makes me feel like I've had a proper holiday 3. Has good beaches	1.Typically a seaside break for two 2.Half will book their holiday online 3.More likely to stay in a hotel or caravan / holiday camp 4.Spent time shopping, the beach, exploring small towns	1.Likely to read the tabloids and least likely to engage with social media 2.More likely to be in East Midlands 3. More likely than other segments to be single, not living with children. Nearly half are over 55+ 4. Lower household income <£20k
Free and Easy mini breakers 2.1 holidays a year Like short breaks	1.Easy to get to by public transport 2. Easy to get around by public transport 3. Availability of festivals, music, sporting and cultural events	1.Has beautiful countryside 2. Has interesting towns and cities 3. It is easy to get to	1. Most likely to be a city break for two over 1-3 nights 2. Majority prefer a hotel 3. Prefer to book online 4. More likely to shop, explore the city, visit a museum or gallery and indulge in cultural entertainment	1. Strong users of social media and broadsheets 2. More likely live in the North (East or West) 3. Nearly half are single high proportion with no kids and under 55 years 4. £20-45k income however 1 in 4 earn £45k+

Aspirational family fun 2.7 holidays a year More likely to take a longer holiday than other segments	1.Good nightlife / entertainment 2.Availability of festivals, music, sporting and cultural events 3.Good range of water based / beach activities	1.Offers great entertainment / nightlife 2.Makes me feel like I'm doing less harm to the environment	1.Half stay in hotels with 1 in 5 opting for a b&b instead 2.A city break for at least 3 people 3. Chose the convenience of booking through a aggregator website 4. More likely than the other segments to spend time at a theme park, zoo or sporting event.	1. Highest consumption of broadsheets and free newspapers. Visit UK tourism websites 2. Likely to live In London 3. Under 50 years and most likely to have children. 4. Higher income £35k- £45k +

The Mid Devon Visitor Survey 2016 reflects that the majority of Mid Devon's current visitors meet the profile of the 'Country-Loving Traditionalist'. If the District is to attract a wider range of visitors, particularly the younger, family market, it needs to increase the range of facilities and activities available to meet their needs.

We also need to recognise that those in the 'Aspirational family fun' segment are often highly mobile and may travel widely across the region during their visit, spending the morning at the coast (North or South), then visiting an attraction / city in the afternoon. We need to work closely with neighbouring areas to ensure Mid Devon is not just a base for visiting the wider area, but also attracts visitors in its own right.

9.4 Trends

New types of domestic leisure tourism are emerging (Visit England – Domestic Leisure Tourism Trends for the Next Decade December 2013) which could have a positive impact on rural destinations, through Active and Health tourism as well as visiting friends and relatives.

Visiting Friends and Relatives (VFR) trips are turning into leisure ones. With more budget constraints, consumers are wishing to maximise their leisure time and capitalise on family occasions. As we live longer we create more family occasions to celebrate and create rich family experiences.

Health tourism (such as spa breaks) is driven by a generation of health conscious older people but also the rising perception of time pressures at work and home.

Active tourism is growing as a reaction to more sedentary lifestyles and people wanting to de-stress though adventure experiences.

Food tourism is a growing area with the international market.

9.4.1 International

In 2011 the International Passenger Survey (IPS) revealed that visitors from overseas undertook particular activities whilst in Britain, including going to the countryside and coast. International Passenger Survey figures show that Scotland, Wales, the South West and Yorkshire are most likely to see holiday visits involving visiting rural or coastal locations and walking. Visiting the countryside is especially common in Yorkshire, Scotland and the South

West, with walking in the countryside common (28% took part in countryside walk) in the South West, Scotland and Wales. Visiting villages is most popular in the South West while visiting national parks is particularly popular in Wales, Yorkshire and the South West.

10.0 Product Development

Investigating possible products and marketing options for the future.

Market penetration/consolidation – getting more from existing customers

- A strong brand to re-position the area and reach more of our existing markets.
- Increase the current target market – Couples over 55 with no children (social grade ABC's), Families (social grade ABC's) and visiting Friends and Family, group visits.
- Campaigns specifically to target this market for day visits within the SW region (1hr 30 min radius). Short stay (4 nights) visitors from Bristol, Midlands, Hampshire, South West, South Wales, London and South East and M4 Corridor.
- Visit Devon's objective is to promote the region to international visitors – therefore up to date information is required on their website to promote the area and the activities they want to do e.g. country walks, food tourism & villages to explore.
- Current visitors are least satisfied with the evening / night time entertainment. These areas need to be addressed for the family and over 55 markets.

Market Development – new market segments

- Families – outdoor pursuits / experiences / family ticket offers for attractions
- Business tourism – conferences, events, team building exercises, exhibitions. Mid Devon has good road and rail links making it very accessible and central to the South West.
- Health and Active tourism packages
- Under 55's - Free and Easy mini breakers (no children) – festival development, cultural entertainment.
- International visitors – revamp the countryside walking trails

Product Development – new products

- Events and Festival development – sports events, parks at night
- Trail development - food and drink trails (food tourism), heritage walks (cloth & wool trade / merchants walk) and tree trails.
- Walking and cycling route to quality food and drink establishments.
- Dog friendly holidays / itineraries
- Wet weather attractions
- Group activities – coach parties over 55's
- Food and Drink is a big draw for the area. Develop food trails / walks with our rural and urban restaurants.
- Enhance the Green infrastructure – footpaths and cycle routes
- Family attraction offers and group attraction initiatives
- Outdoor pursuits – stag safari's, fishing
- New family attractions – farm / animal

- Business tourism
- Health – Spa's and retreats
- Leisure and tourism opportunities at J27.
- Enhance evening entertainment for over 55's and families, quality food establishments, comedy club, live music, music in the park, open cinema, skittles nights etc. Joint promotion opportunities.
- Festival development – music, food, themes weekends.
- Accommodation – Good budget hotel accommodation for Fuss Free visitors, quality B&B / guest houses, bespoke / personal touch for Traditional Country lovers. Yurts / Glamping for getting back to nature – Free and Easy mini breakers.
- Introduce a Mid Devon quality awards / recognition scheme
- Itineraries for families, groups and couples.

Diversification – new product and new market

- Create look out points across the district
- New festivals to stretch the holiday season e.g. music festivals
- Garden tours
- Water sports – rivers and canal activities
- Heritage trails – Green Coat scheme
- Sporting events
- Quality assurance schemes. This is particularly important in Mid Devon where the industry is dominated by small / medium enterprises and any new business ideas are most likely to come from the small business/farming sector.
- Top 10 campaigns
- Free and easy mini breakers who enjoy the countryside. Transport is important to this group. Promote access and transport links. Green transport schemes e.g. public transport and cycle hire.

10.1 Summary – Key points for Mid Devon (stage one)

Target segmentation – day and staying visitors

- Expanding over 55's no children (typical Countryside-lover) ABC's
- Attract more Families – ABC's
- Visiting Friends and Relatives - day visitors

Audience location -

- Staying visitors from - Midlands, Hampshire, Bristol, South West, South Wales, London, South East and M4 Corridor.
- Day visitors – radius of 1hr 30mins travel.

Key product development to meet the target segmentation needs:

- Improve green infrastructure (footpaths & cycling) and the promotion of them. Walks linked to local food and drink establishments, best scenic routes, short and long routes etc.
- Developing the night time / evening entertainment. Better coordination to promote what's on offer e.g. most unique pub, best spots for live music and star gazing, evening activities such as skittle hire. Develop new offers such as music in the park events, food and drink campaigns.

- Enhance the local food and drink offer – campaigns / dog friendly establishments, award winning, local offer, best cream tea, best fireplace to sit and eat beside.

11.0 Objectives for 2018 – 2023

Purpose:

To build a competitive and sustainable tourism industry, increasing the contribution tourism makes to our local economy and employment:

Objectives

1. To create partnerships to enable a joint approach to growth	2. To develop a brand and promotional strategy to create regional and national awareness	3. To develop the local offer to create a competitive product which meets our target segment needs.

Priority areas

➢ Develop sector partnerships and communication channels throughout the district. ➢ Create a Mid Devon partnership to promote the District. ➢ Build partnerships with Visit Devon, Area Tourism Partnerships, neighbouring districts, and sectors within Mid Devon ➢ Monitor performance of the local economy and visitor experience to increase standards	➢ Attract and retain more day and staying visitors, targeting over 55's and families ➢ Develop a brand valued by the tourism community. ➢ Create a marketing and promotional strategy for the area ➢ Develop the identity and advertising of our market towns ➢ Identify promotional campaigns and activities to increase footfall	➢ Allocate land at J27 for tourism and leisure development of regional significance ➢ Develop products and experiences in line with the target market and trends. ➢ Support tourism business development ➢ Enhance the evening and night time economy ➢ Develop green infrastructure ➢ Enhance food and drink offer – food tourism ➢ Develop events & festivals

A number of organisations are responsible for achieving these objectives. Therefore, we need to consult with the wider tourism sector a) to adopt this destination plan b) to agree the objectives c) to establish how we will achieve the objectives which will form the priorities and action plan for the next 5 years.

Appendix A - List of Mid Devon Attractions (as of Dec 2017)

Paid Visitor Attractions (13) *(charging an entrance fee)*
Badger Watch
Bear Trail
Coldharbour Mill
Devon Railway Centre
Diggerland
Downes House
Fursdon House
Knightshayes
Quad World
Tiverton Canal Co., Canal Barge
Tiverton Castle
Tiverton Museum of Mid Devon Life
Yarak Birds of Prey

Visitor Attractions *(without an entrance fee)*
Bampton Heritage Centre
Grand Western Canal
Holy Cross Church, Crediton
St Andrew's Church, Cullompton
St Peter's Church, Tiverton

Leisure and Sports Activities
Tiverton Golf Course
Downes Golf Course, Crediton
Exe Valley Leisure Centre
Lord's Meadow Leisure Centre
Culm Valley Leisure Centre
Goodiford Mill Fishing Lakes
Lakeside View Carp Fisheries
Newcourt Barton Fishery
Kia Ora Fishery
Digger Lakes
Coombelands Coarse Fishery
Four Ponds Fishery
Lower Hollacombe Fishery

Wedding and Conference Venues
Bickleigh Castle
Bridwell Park
The Corn Barn
Duvale Priory
Hillersdon House
Huntsham Court
Middle Combe Farm
Muddifords Court Country House
Padbrook Park, Cullompton
The Oak Barn, Hittisleigh
St Andrew's Community Centre, Cullompton
Stoodleigh Court
Tiverton Hotel
Upton Barn