

forming strategic partnerships with local attractions and wider Devon Destination Management Organisations.

- 1.3 The impact of COVID and the more recent cost-of-living pressures on the leisure and tourism sectors has been significant. Therefore, although the Management Plan was initially a 5-year Plan, this was extended to 2025 to allow more focused actions on supporting recovery. Through the work of the Shared Prosperity Fund, the Economic Development Team has facilitated promotional campaigns as well as funding and developing the local offer.
- 1.4 The Destination Management Plan is being reviewed with a new draft 5-year Plan to come forward for approval in April 2025.

2.0 Tourism Data

- 2.1 To monitor the District's tourism economy, the Economic Development Team utilises the following information and data sources:
- **Tourism Report:** The Team commissions an annual 'Volume and Value of Tourism Report', which outlines the impact of visitor expenditure. The data is derived using the Cambridge Economic Impact Model (using national tourism surveys and regional / local data such as a Mid Devon's accommodation stock and occupancy). The report highlights the number of jobs, overnight/day visits and visitor spend. This data is reported a year behind, so the last report we have is for 2023.
 - **Visitor Surveys:** The Council has commissioned a visitor survey (seeking feedback from visitors to Mid Devon) as part of preparation for the review of the Destination Management Plan. This helps us understand our visitor profile, characteristics, destinations of choice and satisfaction feedback. The most recent survey was conducted this year (2024) with comparison to the previous survey in 2016.
 - **Town Centre Footfall:** Through a contract with Visitor Insights, we have access to town centre footfall data for Crediton, Cullompton and Tiverton. The plotted boundaries (geofences) align with the boundaries of the town centres as identified in the Local Plan. In addition to footfall count, the data allows us to monitor:
 - Visit profile (visits by time of day / day of week)
 - Dwell time
 - Visit frequency (including or excluding workers)
 - Street-level footfall heatmaps
 - Catchment (where visitors come from) (including or excluding workers)
 - Additional demographic data is available at an extra cost.
 - **Coach Bookings:** Through a partnership agreement, the Tiverton Tourist Information Centre manages the coach bookings for us in Tiverton. They

provide quarterly reports to us on the number of coach bookings and the coach companies visiting.

- **Retail, Leisure and Tourism Study:** As part of the review of the Local Plan, the Forward Planning Team commissioned a study looking at Mid Devon's retail and tourism offer. This study (undertaken in 2023/24) identified family and town-centre based attractions as areas for potential growth in the District.
- **Digital Engagement:** We are also able to monitor our digital footfall through the Visit Mid Devon website and social media accounts. This tells us the demographic profile of visitors engaging in our digital content (age/gender/location).

3.0 Tourism Profile

3.1 In 2023, Mid Devon attracted approximately 232,000 staying visits from UK and overseas visitors combined with approximately 1.4 million day visits, generating an estimated £121 million worth of visitor spend in the local economy.

3.2 Approximately 1,553 full time equivalent jobs within the district are tourism related, representing 5% of all employment in Mid Devon.

4.0 Visitor Survey

4.1 Between the 2024 Easter holidays and October Half-Term, South West Research Company conducted a visitor survey on our behalf.

4.2 400 adults (aged 16+ years) were interviewed face-to-face at key attractions and places of interest across Mid Devon. In addition, an online visitor survey was set up with the link promoted by local attractions and on the Visit Mid Devon website and Facebook page. A total of 204 useable online survey submissions were collected by the survey closing date. Therefore, the results are based on a combined sample of 604 visitors to Mid Devon.

4.3 Sample collection points:

- Tiverton Canal Basin car park/Visitor Information Centre
- Coldharbour Mill
- National Trust Knightshayes
- Diggerland
- Tiverton Museum
- The Bear Trail/Bear Town
- Bickleigh Mill
- Crediton
- Devon Railway Centre
- Bampton

4.4 Key findings

- 4.4.1 The findings from the 2024 visitor survey portray a positive and encouraging picture of Mid Devon as a tourism and leisure destination in the South West region.
- 4.4.2 The survey highlighted that Mid Devon remains a day visit destination predominantly, attracting day visits from within the district as well as outside the district (including those on holiday elsewhere). The results suggest that, compared to 2016, people are travelling less both from home and while on holiday and this is most likely because of the cost of living crisis.
- 4.4.3 The main visitor market for the district continues to be people living within the immediate South West region who account for around two thirds of all visitors to the district (67%) and this proportion that has increased slightly compared with 2016.
- 4.4.4 Whilst the majority of visitors to Mid Devon continue to visit in adult only groups (59%), there are signs of an increase in its popularity amongst those visiting with children which, at 41%, has increased by 9% compared with the 2016 survey (32%).
- 4.4.5 The district continues to attract a high proportion of repeat visitors across all visitor types and this is likely to be largely due to the fact that visitors appear to be relatively satisfied with the visitor experience they have had and the tourism product on offer to them. In particular, satisfaction levels were highest for the quality of service and value for money of accommodation, the overall enjoyment of visit and feeling of welcome. Visitors particularly enjoy the countryside in Mid Devon, the range of things for children, the scenery, the friendliness of the locals and natural beauty of the district.
- 4.4.6 Visitors highlighted the following areas for improvement: the quality of service/availability of public transport, the availability of public toilets and the range of shopping. A number of comments were also provided around potholes along with the roads in general and parking.
- 4.4.7 The 2024 survey has seen Mid Devon improve its recommendation score from +42% in 2016 to +52%, indicating that a good proportion of visitors are likely to recommend a visit to Mid Devon to others.

5.0 Visitor Profile

- 5.1 Based on the sample from the Visitor Survey, Mid Devon's Visitor Profile shows that:
- 63% of all visitors were on a day visit from home including 27% of visitors who lived within Mid Devon and 36% who lived outside of the district.
 - 59% of all visitors were visiting in adult-only groups.
 - Average group size was 2.91 people.
 - At 24%, the largest proportion of visitors to the district were aged 65+ years and 14% were aged 55-64 years, representing a combined total of 38% of all visitors being aged 55+. 21% of all visitors were aged between

35-54 years and 12% were aged 16-34 years . 28% of all visitors were children aged 15 years or younger including 14% in each case aged 0-4 years and 5-15 years.

- 47% of visitors were male and 53% female.
- 97% of all visitors to the district were from the UK. 27% were residents of Mid Devon, 22% lived elsewhere in Devon and 18% lived elsewhere in other areas of the South West. 29% were from other parts of the UK and 3% of visitors were from overseas.
- 45% of UK visitors lived within the 'EX' Exeter postcode area.
- 10% of staying visitors in Mid Devon were from overseas.

5.2 Characteristics of visits:

- 82% of visitors were on a leisure/holiday related trip to Mid Devon. 8% of visitors were visiting friends or relatives.
- 46% of staying visitors were staying overnight in accommodation in Tiverton and 7% in each case in Cullompton, Crediton and Bampton.
- The average length of stay in the district was 4.66 nights.
- 5% of day visitors on holiday who were visiting Mid Devon from a nearby holiday base outside the district in each case said they were staying overnight in accommodation in Somerset (unspecified area) and Dulverton. 4% in each case said they were staying in Exeter, Dawlish, Devon (unspecified area), Haven (accommodation provider), South Molton and Cornwall.
- 45% of all staying visitors had booked their accommodation in Mid Devon direct with their accommodation provider. 13% had booked through Airbnb, 10% through another online agent (OTA) and 4% had done so through a self-catering agency.
- 83% of visitors were on a repeat visit to Mid Devon.
- 89% of visitors had arrived by car, van etc. 5% of visitors had walked from their home/accommodation, 3% had travelled by scheduled bus/coach service and 2% had arrived by train (0% 2016). 2% had arrived by plane/air travel and 1% had used a bicycle.
- Visiting an attraction, eating & drinking in a restaurant/café/pub and going for a walk were the most popular activities undertaken during a visit to Mid Devon (across all visitor types).

5.3 Comparison to 2016:

- 7% increase in day visitors from home living within Mid Devon (63% in 2024 compared with 56% in 2016).
- 9% increase in the proportion of groups visiting with children (41% in 2024 compared with 32% in 2016).
- Slight increase in average group size (2.91 people in 2024 compared with 2.85 in 2016).
- 6% decrease in visitors aged under 55 years (38% in 2024 compared to 44% in 2016).

- Significant increase of 19% in visitors falling within socio economic groups AB (professionals in senior or middle management positions) (55% in 2024 compared with 36% in 2016).
- Increase in first-time visitors to Mid Devon (17% in 2024 compared to 12% in 2016).

6.0 Next Steps

- 6.1 The Economic Development Team is in the process of drafting the revised Destination Management Plan (with the view to expanding it as a Destination and Culture Management Plan). This new Plan will align with the new Economic Strategy for Mid Devon and the Corporate Plan.
- 6.2 The results of the Visitor Survey will be incorporated into the new Plan and used to facilitate action planning exercises as part of the Economic Strategy Informal Economy and Assets PDG sessions with Members.
- 6.3 From the initial feedback, it is expected that some elements of the Plan will identify areas of growth around the Mid Devon Walking Festival, signage and partnerships/networks (with tourism businesses).
- 6.4 The Team will continue to undertake promotional activities to raise awareness of Mid Devon as a tourism destination and to promote the Visit Mid Devon platforms. We are working with the new Devon Local Visitor Economy Partnership (LVEP) and have supported the formation of a new South West Tourism Data Hub. We will look to utilise these partnerships to direct and monitor delivery. Visit Britain are focussing on themes around sustainability, accessibility and wellbeing and there is a national spotlight on sports, arts and culture as tourism drivers. This direction will be fed into the LVEP, which aims to form a Devon-wide Destination Management Plan over the next 3-5 years. Our Destination Management Plan will be informed by and support this new Plan.

Financial Implications

The report is an information report and does not of itself have any financial implications and require any decisions.

Legal Implications

There are no legal implications arising from this information report.

Risk Assessment

There are no further risks associated with the updates in this report that have not already been reported.

Impact on Climate Change

Sustainability is a priority area for Visit Britain and will be featured in the new Destination Management Plan as an underlying theme.

Equalities Impact Assessment

Accessibility and wellbeing are two priority areas for Visit Britain and will be featured in the new Destination Management Plan as underlying themes.

Relationship to Corporate Plan

The Destination Management Plan supports the corporate objective for the economy and assets:

- We will support business and economic development across Mid Devon, enabling job creation, and supporting sustainable tourism growth

Section 3 – Statutory Officer sign-off/mandatory checks

Statutory Officer: Andrew Jarrett

Agreed by or on behalf of the Section 151

Date: 4 December 2024

Statutory Officer: Maria DeLeiburne

Agreed on behalf of the Monitoring Officer

Date: 4 December 2024

Chief Officer: Richard Marsh

Agreed by Corporate Director

Date: 4 December 2024

Performance and risk: Steve Carr

Agreed on behalf of the Corporate Performance & Improvement Manager

Date: 03 December 2024

Cabinet member notified: yes

Section 4 - Contact Details and Background Papers

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Background papers: