Mid Devon Tourism Study

Mid Devon District Council

Final Report

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Contents

1	INTRODUCTION	5
2	STRATEGIC CONTEXT	9
3	TOURISM INFRASTRUCTURE IN MID DEVON	13
4	TRENDS IN THE TOURISM INDUSTRY	21
5	RESULTS OF STAKEHOLDER CONSULTATION	29
6	CONCLUSIONS	35

List of Figures

FIGURE 1:	DEVON	5
FIGURE 2:	SETTLEMENTS IN MID DEVON	6
FIGURE 3:	MAJOR TOURIST ATTRACTIONS IN MID DEVON	13
FIGURE 4:	MAJOR GREEN INFRASTRUCTURE IN MID DEVON AND SURROUNDING AREAS	15
FIGURE 5:	ROOM STOCK AND BED SPACES IN MID DEVON	16
FIGURE 6:	CAMPING AND CARAVAN SITES IN MID - DEVON	17
FIGURE 7:	CHANGES IN TOURISM TRIPS, 2006 - 2011	18
FIGURE 8:	HOTELS AND B&BS	39
FIGURE 9:	SPECIALITY LODGINGS	40

List of Tables

TABLE 1:	PROFILE OF DAY VISITORS BY TYPES OF VISIT, 2011	24
TABLE 2:	DURATION OF STAY FOR DAY VISITORS, 2011	24

Appendices

APPENDIX A:	ACCOMMODATION WITHIN 10 MILES OF MID DEVON’S MAIN TOWNS	39
APPENDIX B:	CAMPSITES WITHIN 10 MILES OF MID DEVON’S MAIN TOWNS	41

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1 INTRODUCTION

Introducing Mid Devon

1.1 Mid Devon District occupies a strategic location between Exeter and Taunton. The District is 913 sq.km[1] in size and includes three main market towns – Tiverton, Cullompton and Crediton – as well as smaller settlements and rural areas.

1.2 Accessibility to the area from the rest of the UK is strong, with the M5 Motorway and main rail services running through the eastern part of the District, with two motorway junctions (Junctions 27 and 28) serving the District together with Tiverton Parkway Rail Station which provides mainline rail services to London, Bristol, the Midlands and North as well as other parts of Devon and Cornwall. The A361 North Devon Link Road connects the M5 at Junction 27 with Exmoor, Barnstaple and the North Devon Coast. The Tarka Line also provide local rail services linking a number of settlements across the District to Exeter and Barnstaple. There are also proposals for a new rail station at Cullompton and Exeter airport is located near to Junction 29 of the M5 to the south of the District.

Figure 1: Devon[2]

[1] Assembling the evidence base for the Local Economic Assessment -SQW – May 2011
[2] http://www.devon.gov.uk/tourism_trends_in_devon_2006_final1.pdf

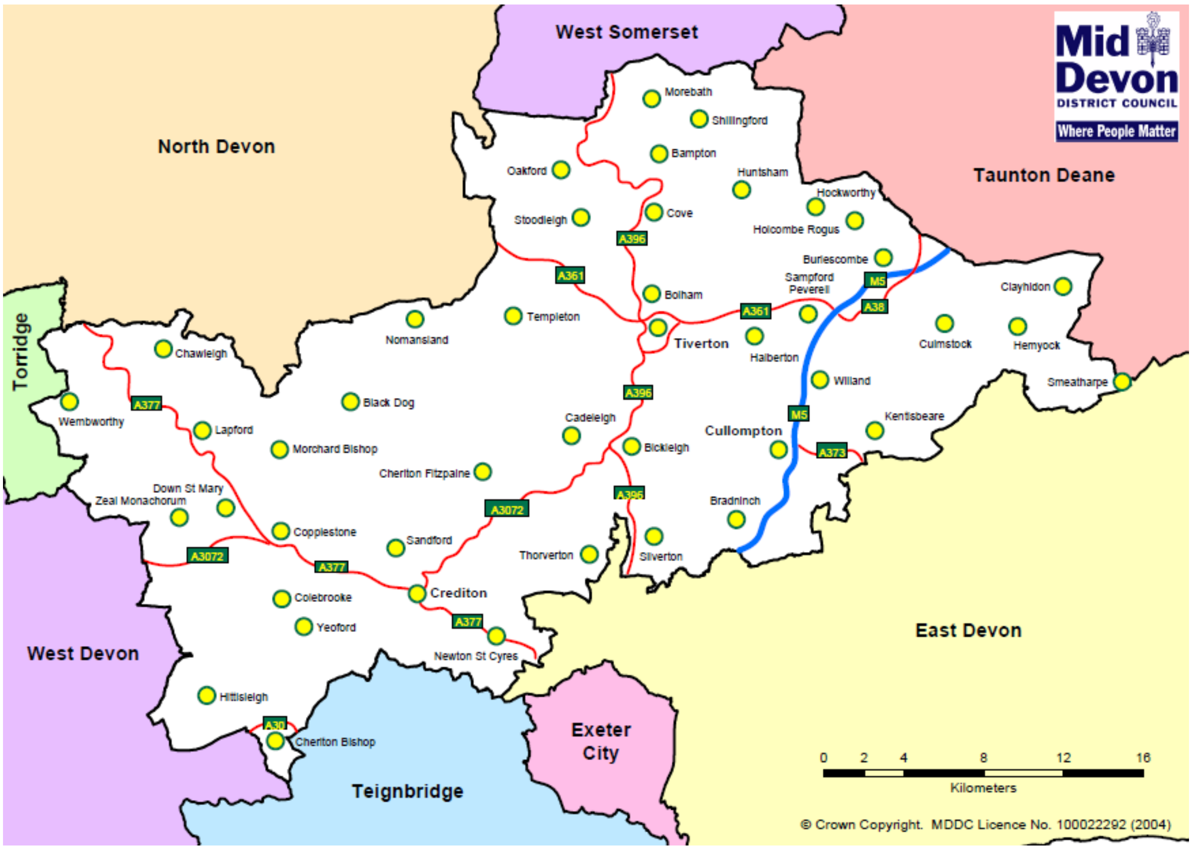
Source: Devon County Council

1.3 In total, Mid Devon has a resident population of approximately 76,000 people. Within the District, there are around 3,400 businesses generating approximately 23,000 employee jobs. When considering a range of metrics, Mid Devon accounts for roughly 10% of Devon's economy[3]. Tourism is an important part of Mid Devon's local economy.

1.4 The main towns in Mid Devon are:

- Cullompton, which is located to the South East of the district and is to the West of the M5 has a catchment population of just over 23400.[4]
- Credition, located to the South West of the district (close to Dartmoor) just off the A377 which has a population of over 20400.[5]
- Tiverton, which is located towards the North East of the District, just off the A361 has a catchment population of 38300.[6]

Figure 2: Settlements in Mid Devon



3 http://www.devonomics.info/documents/area-profile-mid-devon
4 http://www.devon.gov.uk/index/councildemocracy/neighbourhoods-villages/devon-town-focus/cullompton.htm
5 http://www.devon.gov.uk/index/councildemocracy/neighbourhoods-villages/devon-town-focus/crediton.htm
6 http://www.devon.gov.uk/index/councildemocracy/neighbourhoods-villages/devon-town-focus/tiverton.htm

1.5 Mid Devon has strong cultural, heritage and environmental assets. The District has over 2, 500 listed buildings, 50 Conservation Areas and 49 Scheduled Ancient Monuments. It has 476 miles of public rights of way through the District which includes regional walking routes such as the Two Moors Way and the Exe Valley Way. In addition, there are parks or gardens on the English Heritage National Register (including Knightshayes near Tiverton and Shobrooke near Crediton). Mid Devon is also in close proximity to Exmoor National Park (located north of the District) and Dartmoor National Park (located south west of the District).

1.6 Whilst Mid Devon is not a major tourism destination in itself, over the past 20 years, the numbers of bed nights per year in the district have doubled from approximately 250,000 to 500,000. This has been aided by the existence of the M5 Motorway which runs across the district. [7]

Study Objectives

1.7 The National Planning Policy Framework (NPPF) was published by Government in March 2012[8]. This emphasises that Local Planning Authorities should support the development of sustainable rural tourism and leisure, setting out in Paragraph 28 that:

Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. To promote a strong rural economy, local and neighbourhood plans should:

- *support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings;*
- *promote the development and diversification of agricultural and other land-based rural businesses;*
- *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; and*
- *promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship.*

1.8 This study is focused on the third of these bullet points, and considers the current rural tourism and leisure infrastructure within Mid Devon District and how this could be developed to support economic growth.

1.9 For the purposes of the assessment we consider that the key towns in Mid Devon – Tiverton, Cullompton and Crediton - can be regarded as rural service centres. This is supported by their

[7] Economic Development Manager – Mid Devon Council
[8] CLG (2012) *National Planning Policy Framework*

status in the adopted Mid Devon Local Plan. The core aims of the assessment are to consider what tourism facilities exist in the District, what facilities might be expected in Mid Devon and/or opportunities to develop the tourism offer.

1.10 The remainder of the Study comprises:

- **Section 2: Strategic Context** – defines tourism, and reviews strategic policy documents at a national, regional and local level;
- **Section 3: Tourist Infrastructure in Mid Devon** – review of current tourist infrastructure in Mid Devon District;
- **Section 4: Results of Stakeholder Consultation** – assessment of strategic trends in the tourism industry at a national and regional level, gap analysis in regard to current infrastructure in Mid Devon and findings from consultation with key stakeholders;
- **Section 5: Study Conclusions** – draws the analysis together to set out conclusions for how the tourism offer in the District could be developed.

2 STRATEGIC CONTEXT

Defining Tourism

2.1 The Department for Communities and Local Government uses the World Tourism Organisation's (WTO) definition of Tourism in its good practice guide on Planning for Tourism (2006). This defines tourism as comprising:

> *the activities of persons travelling or staying in places outside of their usual environment for not more than a year for leisure, businesses and other purposes. It includes visitor activities both 'same day' and where this involves an overnight stay.*

2.2 Sustainable tourism is defined by the WTO as:

> *tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.*

2.3 Sustainable rural tourism refers to this definition of sustainable tourism in rural, rather than urban areas.

2.4 Tourism infrastructure includes tourist and visitor facilities, as well as accommodation and restaurants which support tourism.

Strategic Policy Context

The National Planning Policy Framework (NPPF)

2.5 The National Planning Policy Framework (NPPF) was published in March 2012. It replaces existing Planning Policy Guidance, Planning Policy Statements and other planning policy guidance at national level with a single document. Sustainable development is a theme which runs throughout the document.

2.6 Paragraph 28 outlines what local plans must do support a prosperous rural economy and promote sustainable development. As part of Paragraph 28, it states that 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."*

National Tourism Strategy

2.7 The National Tourism Strategy was published by Government (the Department for Culture, Media and Sport) in March 2011. It covers a wide range of issues which impact either the productivity of the industry or the quality of visitor's experiences. The document illustrates the importance of the visitor economy to the UK and how the Government aims to help tourism achieve its potential as a central part of Britain's growth strategy. The three key aims are of the strategy are:

- To fund a marketing campaign ever to attract visitors to the UK in the years following 2012 which aims to attract 4 million extra visitors to Britain over the next 4 years and the creation of 50,000 new jobs;
- To increase the proportion of UK residents who holiday in the UK to match those who holiday abroad each year; and
- To improve the sector's productivity to become one of the top 5 most efficient and competitive visitor economies in the world.

2.8 The strategy seeks to increase tourist numbers – from both at home and overseas – and to improve productivity to make the sector more competitive.

Mid Devon Local Plan Review

2.9 Mid Devon District Council is reviewing its Local Plan. It is anticipated that the Local Plan Review (i.e. the review of the three adopted parts of the Local Plan) will be submitted to the Secretary of State in Spring 2015 for examination in Summer 2015. The policies within the Council's existing Core Strategy (Local Plan Part 1) which directly relate to tourism are shown below:

- Policy COR 4 in Mid Devon Council's Core Strategy (Local Plan Part 1) focuses on meeting employment needs and enhancing sustainable employment generation land uses, including tourism. It aims to increase the number of visitors and tourist accommodation spaces year on year.
- Policies CO14, CO16 and COR 17 contain specific aims to develop the tourism and visitor role and enhance employment in Cullompton, Bampton and the designated villages. Policy COR 18 permits appropriate tourism related development in rural areas.

Organisations Involved in Promoting Tourism in Mid Devon

2.10 There are a number of organisations responsible for promoting tourism. These include the following:

- Heart of Devon Partnership
- Devon Tourism Partnership
- Heart of the South West Local Enterprise Partnership
- Mid Devon District Council and Neighbouring Councils

2.11 The Heart of Devon is a partnership which promotes East Devon, Exeter, Mid Devon and parts of Teignbridge to regional and national audiences.[9] The partnership's main aim is to increase the number of day visits, short breaks, longer holidays and business trips to the Heart of Devon for the benefit of the local tourism economy.

[9] http://www.exeterchamber.co.uk/heart-of-devon-tourism-partnership/marketing-services/chamber-member

2.12 The Devon Tourism Partnership is the Destination Management Organisation for Devon and came into effect in April 2012. The public face of the Devon Tourism Partnership is the Visit Devon brand. The partnership protects and promotes the Visit Devon brand with a range of marketing initiatives and acts as the voice of Tourism for Devon, working with the Local Authorities, the Local Enterprise Partnership and Visit England. The Partnership's strategic aims are listed below:

- Deliver the Tourism Strategy for Devon aligning to the Visit England framework;
- Provide strategic support to the Devon Tourism sector;
- Promote the Devon brand through marketing and PR campaigns;
- Provide a collective voice for Devon tourism;
- Develop the quality agenda for Devon;
- Support for skills development for the tourism sector; and
- Manage a cohesive county wide visitor research programme to monitor the performance of the destination.

2.13 The Heart of the South West (HofSW) LEP is the Local Enterprise Partnership for Devon, Plymouth, Somerset and Torbay. The Heart of the South West's purpose is to lead and influence outcomes for the economies of Devon, Somerset, Plymouth and Torbay by improving economic growth and job creation. The LEP's key priorities are listed below:

- Drive productivity and enterprise: By stimulating greater innovation and creating an economic environment, we will support the competitiveness of businesses and social enterprises, to encourage new business growth and improve productivity.
- Attract new business and investment: By supporting businesses to compete both within the South West and outside in the wider global economy, we will help our businesses exploit opportunities to extend their customer and supply base.
- Maximise employment opportunities: By ensuring that people living in HotSW areas acquire, maintain and enhance the skills and aspirations needed to secure fulfilling, long-term employment.
- Promote infrastructure to connect with markets: By making the case for critical infrastructure which will allow South West businesses to access opportunities and compete effectively.

2.14 To achieve its objectives, the LEP is focusing on a number of areas - tourism is one of these focus sectors and is seen as vital to the economy of the South West looking forward.

3 TOURISM INFRASTRUCTURE IN MID DEVON

3.1 This section profiles tourism infrastructure in Mid Devon in 2013. It considers tourism infrastructure structured around the following categories:

- Attractions;
- Natural/green infrastructure; and
- Accommodation.

3.2 It then considers evidence of tourism visitor numbers and spend based on the evidence available.

Tourist Attractions

3.3 Key tourist attractions include museums (such as Coldharbour Working Wool Museum and Tiverton Museum), stately homes (such as Knightshayes) and castles (at Bickleigh, Hemyock and Tiverton) and family attractions (including Diggerland, Amazing Maze, and the Tarka Line). The major tourist attractions in Mid Devon are profiled in Figure 3.

Figure 3: Major Tourist Attractions in Mid Devon

Attractions	Type	Location (Nearest Main Settlement)
Diggerland	Family Attractions	Cullompton
Coldharbour Working Wool Museum	Museum	Cullompton
Hemyock Castle	Castle	Cullompton
Tiverton Museum of Mid Devon Life	Museum	Tiverton
Knightshayes Court	Stately Homes	Tiverton
Bickleigh Castle	Castle	Tiverton
Amazing Maze	Family attractions	Tiverton
Tiverton Castle	Castle	Tiverton
Devon Railway Centre	Family Attraction	Tiverton
Bickleigh Mill	Converted Mill (now Retail and Restaurant).	Tiverton
Yearstone Vineyard	Vineyard	Tiverton
Tiverton Canal Company	Family Attraction	Tiverton
Abbotshood Cycle Hire (Grand Western Canal)	Outdoor Activities	Various Including Tiverton)
The Collegiate Church of the Holy Cross	Church	Crediton
Treloars	Food Attraction / Local Fayre	Crediton
Tarka Line	Outdoor Activities	Various (including Crediton)
Shobrooke	Park and Lakes (outdoor attraction)	Crediton

Source: Various including Mid Devon Council

3.4 Data from Visit England's Annual Survey of Visits to Visitor Attractions covers three attractions in Mid Devon - The Collegiate Church of the Holy Cross, Abbotshood Cycle Hire and Knightshayes Court. The data shows that Abbotshood Cycle Hire (located along the Grand Western Canal in Tiverton) has consistently had the highest number of visitors since 2008 of the three attractions counted in the survey.

3.5 The data from the Annual Survey of Visits to Visitor Attractions also shows there has been an increase in the number of visitors to The Collegiate Church of the Holy Cross (a church located in Cullompton and a prominent building dating back to approximately the 12/13th Century) since 2008. Levels of visitors to Abbotshood Cycle Hire and Knightshayes Court (a Victorian country house with gardens) have remained largely consistent year-on-year since 2008. This may reflect visitors choosing money saving activities at a time of economic uncertainty. The number of attractions in the District which are included in this national survey is limited.

Events

3.6 In addition to the tourist attractions described above, there are a number of key events in each of the three main market towns in the District which attract visitors and visitor spend. These are as follows:

- **Cullompton**:
  - Cullompton Pannier Market (on Wednesdays and Saturdays); and
  - The Christmas Market and Food Fayre in December.
- **Crediton**:
  - Crediton Flower Festival.
- **Tiverton**
  - Tiverton Pannier Market (on Tuesdays, Fridays and Saturdays);
  - Mid Devon Show in July; and
  - Tiverton Hot Air Balloon Festival in May.

3.7 The events thus include weekly markets which are likely to attract people from a relatively local catchment, through to annual events and festivals in each of the market towns which may attract visitors from both the local area and further afield.

Green Infrastructure

3.8 Green infrastructure is defined by Devon County Council in the following way:

> *"a network of natural spaces and corridors that contribute towards the conservation of biodiversity, the movement of wildlife and people (for commuting and recreation) and the provision of environmental services such as flood defence or absorption of air pollution."*

3.9 This includes, nature reserves, National Parks and routes used to access them such as cycle routes and pathways.

3.10 The major green infrastructure assets in or adjacent to Mid Devon are:

- The Great Western Canal,
- Dartmoor and Exmoor National Park; and
- Blackdown Hills.

3.11 The Grand Western Canal runs between Taunton and Tiverton and is now a designated as a country park and as a Conservation Area. It extends for approximately 18 km and is used for cycling, walking and canal-based activities.

3.12 The Dartmoor National Park covers approximately 953 sq.km and is located in the south of Devon, to the south west of the District. The town of Crediton is relatively close to Dartmoor and a small part of its area falls within Mid Devon.

3.13 Exmoor National Park is 692 sq.km in size and is located just outside Mid Devon in the north of Devon. It contains moorland, woodland, valleys and farmland. 79% of the Exmoor National Park falls in Somerset and 29% in Devon. Tiverton Parkway Rail Station and the A361 provide important gateways to the Exmoor National Park.

3.14 The Blackdown Hills are a collection of steep, scarp hills on the border of Somerset and Devon covering 370 sq.km and are designated an Area of Outstanding Natural Beauty (AONB). They are located in Mid and East Devon as well as Somerset.

Figure 4: Major Green Infrastructure in Mid Devon and Surrounding Areas

Natural / Green Infrastructure
Grand Western Canal
Dartmoor National Park
Exmoor National Park
Blackdown Hills AONB

3.15 Important gateways to these areas, and to the North Devon Coast, are located within Mid Devon including Tiverton Parkway Rail Station – which is served by Cross Country and Great Western mainline rail services – and Junction 27 which links the North Devon Coast and southern parts of Exmoor to the M5 and national motorway network via the A361. As a result a significant number of visitors to these areas pass through Mid Devon.

Accommodation

3.16 Tourist accommodation comprises serviced accommodation (hotels and B&Bs) and non–serviced accommodation (such as holiday dwellings and campsites).

3.17 Figure 5 below shows the breakdown in the number of rooms and bed spaces in Mid Devon in 2010 based on Visit England data.

3.18 Looking at the bed spaces data, the highest number of bed spaces is in hotel accommodation (1235 bed spaces), followed by camp sites (1048 bed spaces) and then holiday dwellings (945 bed spaces) to give a total of 3228 bed spaces.

Figure 5: Room Stock and Bed Spaces in Mid Devon

	Hotels/ B&Bs	Holiday Dwellings	Tourist Campsites	Total
No of Rooms	557	139	568	1264
No of Bedspaces	1235	945	1048	3228

Source: Visit England - Local Authority Analysis of Accommodation – Room Stock and Bedspaces (2010)

3.19 Appendix A details the accommodation available in and nearby the 3 main towns in Mid Devon using Trip Advisor and the Visit England website[10]. It should be noted that not all of the B & Bs in the Mid Devon area are advertised online and will, therefore not be in the table.

3.20 Serviced accommodation in Mid Devon tends to take the form of small and mid-sized hotels and bed and breakfast accommodation.

3.21 The Caravan and Camping Club website shows that there are 24 campsites within 10 miles of Tiverton, Culompton and Crediton. These are detailed in Appendix 2. The main camp sites in the Mid Devon area (using the Postcodes EX15 for Cullompton, EX16 for Tiverton and EX17 for Crediton) area are shown in Figure 7. Most campsites in the District are located around Crediton and Tiverton, accessible from the A361. The campsites vary in size and character.

3.22 There are a number of canal sites in the Tiverton area including: Minnows Touring Park (a small caravan site beside the Great Western Canal), West Middlewick Farm (a working farm with a campsite) and Zeacombe House Caravan Park (an adults only caravan park).

3.23 In Crediton, there are a number of caravan parks and camping facilities including small sites such as Salmonhutch Coarse Fishery and ‘Oh What a View’ and sites with a larger capacity such as Yeatheridge Farm Caravan Park (which has 85 pitches).

[10] On the 24th September 2013 and 2nd October 2013

3.24 Forest Glade Holiday Park has achieved a 4* rating and is located in Cullompton, near to the Blackdown Hills. Elsewhere in Cullompton are a range of niche campsites including Goodiford Mill Fishery and Leisure Park and Blackdown Yurts, Blackdown Yurts, near the Blackdown Hills, provides glamping (glamorous camping) facilities including yurts, compost loos and wood burners.

Figure 6: Camping and Caravan Sites in Mid - Devon

Camp site	Postcode	Nearest Market Town
Forest Glade Holiday Park	EX15 2DT	Cullompton
Blackdown Yurts	EX15 2HN	Cullompton
Goodiford Mill Fishery and Leisure Park	EX15 2AS	Cullompton
New Court Baron	EX15 1SE	Cullompton
Verbeer Manor Caravan and Camping Park	EX15 1SE	Cullompton
Waterloo Inn Camping and Caravan Park	EX15 3ES	Cullompton
Minnows Touring Park	EX16 7EN	Tiverton
Acorns Naturist Retreat	EX16 8EL	Tiverton
West Middlewick Farm	EX16 8NP	Tiverton
Zeacombe House Caravan Park	EX16 9JU	Tiverton
Poachers Pocket	EX16 7JY	Tiverton
Four Ponds Fishery	EX16 9BU	Tiverton
The Waie Inn	EX17 6DF	Crediton
Yeatheridge Farm Caravan Park	EX17 4TN	Crediton
Salmonhutch Coarse Fishery	EX17 3QL	Crediton
Oh What a View	EX17 4BH	Crediton

Source: Heart of Devon / The Caravan and Camping Club / Campsite Review

Tourism Visitors and Spend

3.25 In this section we review available data regarding visitor spending in Mid Devon (and the county more widely).

3.26 The GB Tourism Survey 2011 is a survey of 15,000 respondents nationally. It shows that the total number of trips to Mid Devon increased by 14% between 2006-11. This compares with a relatively static position across Devon as a whole.

3.27 Of the total trips taken in Mid Devon, there have been increases in the number of overall trips taken but a reduction in the number of holiday trips. The growth has been in business trips, and trips to visit friends and relatives. This reflects wider trends of increases of shorter holiday trips being taken (as discussed in the next section). The data should be treated with some caution as the number of people surveyed for individual local authorities may be very low.

3.28 Total tourism spend in Mid Devon was estimated £30 million in 2011 which is lower than other areas in Devon. This probably partly reflects the lack of larger tourism attractions in the District; together with the above average proportion of visitors who stay with friends or relatives.

Figure 7: Changes in Tourism Trips, 2006 - 2011

	Total Trips	Holiday Trips	Total Nights	Holiday Nights	Total Spend	Holiday Spend
Mid Devon	14%	-15%	13%	-19%	25%	-12%
Devon	0%	2%	3%	3%	1%	3%

Source: GB Tourism Survey 2006- 2011

3.29 Few tourist attractions in Mid Devon have collected data on visitor figures. However, most attractions, such as Tiverton Museum of Mid Devon Life and Tiverton Castle**,** said that the majority of visitors were local. This high proportion of local visitors can be seen by data provided by the *Tiverton Museum of Mid Devon Life* profiling visitors in 2011 which was as follows:

- 40% were from the local area;
- 23% were from elsewhere in the south west region;
- 29% were from the other regions in the UK;
- 8% were from abroad.

3.30 Data provided by The *Heart of Devon Tourism Partnership* showed that in 2011, UK staying visitors spent an average of 4 nights in Mid Devon and spent £158 on their trips (compared with an average of 4 nights and an average spend of £187 across all districts in Devon). The number of nights stayed is consistent with other Devon Districts, but the average spend in Mid Devon is lower.

3.31 Overseas visitors stayed an average of 9 nights in Mid Devon (consistent with the level across other Devon districts) but again their spend was lower at £363 in Mid Devon compared to £420 across all Devon Districts.

3.32 The average day trips spend in Mid Devon was £29 compared to £34 across Devon. Again this is likely to be a reflection of a more limited range of visitor facilities, and the nature of tourists which Mid Devon attracts, i.e. compared to other parts of the County, it attracts older tourists who enjoy the natural environment rather than for instance families with children spending money at visitor attractions.

3.33 Moving forward, there could be an opportunity to increase visitor spend by improving the District's tourism offer for groups that currently do not have a reason to visit Mid Devon.

3.34 In 2011, 63% of trips to Mid Devon were for holidays, with 24% to see friends and relatives and 9% to do business. Spend by purpose was highest for holidays (76%), followed by visiting friends and relatives (10%) and then business (9%).

3.35 Looking at the type of accommodation tourists stay in, it can be seen that a high proportion of tourists staying in Mid Devon (62%) stay with friends and relatives, rather than in serviced and non-serviced accommodation (22%). This compares with 9% who stayed in self-catering, 6% stayed in touring caravans / tents, 1% in static vans/holiday centres and 2% described as staying in 'other' accommodation.

3.36 There has been an increase in the number of visits from older age groups to attractions since 2007 across the South West. Compared with other attractions in Mid Devon, market town events tend to attract an older demographic with approximately 50% of visitors to market town events being aged between 45-65.

Mid Devon's Tourism Offer

3.37 Summarising the analysis in this section, Mid Devon comprises a range of tourist attractions including castles, museums and other family attractions. It is also within a short distance of green infrastructure assets including Dartmoor and Exmoor National Park. In addition to the physical offer for tourists, the three market towns host a number of events including the Mid Devon Show and Pannier Markets to attract tourists.

3.38 The majority of accommodation is in serviced accommodation (hotels and B&Bs) although there are also a number of campsites and holiday parks. However, a high proportion of tourists stay with friends and family, rather than staying in accommodation.

3.39 Recent trends on tourism visitors have shown increases in shorter trips (business trips and trips to see friends and relatives) and decreases in longer holiday trips. The proportion of visits from older age groups has increased. Data on tourism spend in Mid Devon shows that spend levels are typically lower than in other parts of Devon. Given the District's strategic location by investing further in both the number/quality of tourism attractions and the accommodation offer, there may be an opportunity to grow both the visitor numbers and spend.

4 TRENDS IN THE TOURISM INDUSTRY

National Overview

Key 'Post-Recession' Trends

4.1 Since 2007, it is evident that recession has had an impact on the tourist economy across the UK. Visit Britain's market research[11] shows that nationally 4 in 10 people are spending less on holidays.

4.2 While there has been some growth in people holidaying domestically since 2007, the outlook for long holidays in the UK looks negative as the number of people likely to holiday abroad increasing with some improvement in the outlook of personal finances and linked to poor weather conditions in England in recent summers such as in 2012.

4.3 Visit Britain research identified the key short-term issues affecting tourism as consumer spending concerns and the weather (for outdoor activities and camping in particular). Rises in petrol prices and current exchange rates are other concerns.

4.4 Despite these concerns (and the decline in long domestic holidays nationally and in Devon)**, there has been growth in short breaks and activity breaks**. This has been seen nationally, with the GB Tourist Survey in 2011 showing that since 2007, one to three night holidays in the UK are increasingly more common than 4+ night holidays.

Overall Trends in Visitor Numbers & Spend

4.5 The *GB Tourism Survey 2011* recorded the highest number of UK trips since the Survey began in 2005. This reflected an increased number of short (1-3 nights), rather than long (4+ nights) holiday trips taken. In 2012, there were 127 million trips across Great Britain – up by 9% from 2010, despite the relatively gloomy economic outlook. Expenditure in the 2011 survey increased by 14% from the 2010 survey.

4.6 Of the holidays taken in 2011, looking at domestic holiday tourism 7 out of 10 trips was during the April – September period. This continues to suggest that **UK domestic tourism is strongly focused towards the summer months**.

4.7 Families accounted for the largest proportion of those taking 'pure' holidays (35%). 'Pure holidays' are defined as trips where the main reason for taking the trip is described by the respondent as "holiday, leisure or pleasure" (with no visiting friends or relatives element to the trip). Empty nesters (defined as 55+ years old with no children) accounted for approximately a third of holidays taken

[11] Visit Britain (2012) *Economic Downturn and the 'Staycation'*

(32%) and have seen the largest year on year increase (almost 5% p.a. since 2007.) Older independents (35-54 years & no children) have shown a similar increase (almost 4% per annum since 2007). The trends suggest that **middle aged people without children and particular older people who have retired or are nearing retirement could be key growth markets for tourism within the UK, particularly given demographics whereby the population of older persons is expected to grow quite strongly over the next 20 years.**

4.8 Of all the trips taken nationally in 2011, holiday / leisure tourism increased by 7%, visits to friends and families increased by 10% and business trips increased by 14% from 2010 levels. It should, however, be noted that the increases in 2011 may appear slightly distorted as 2010 levels were low.

4.9 Of domestic overnight tourism trips in 2011, 33% of total spend was on overnight accommodation, travel costs accounted for 25% of total spend and eating and drinking accounted for 20% of spending in 2011. These figures are representative of trends since 2007. Looking more closely at the figures, the proportion of entertainment and shopping has decreased whilst spend in travel and eating and 'drinking out' has increased.

The Tourism Business Monitor Report / Visitor Attractions Report, 2012

4.10 Visit England's Tourism Business Monitor Report / Visitor Attractions Report 2012 showed that nationally in 2012, there was some resurgence in overseas and domestic visitors from elsewhere in the UK. Paid attractions generally performed better (in the Winter Holiday Period) especially among overseas visitors. Large attractions over this period outperformed smaller attractions.

4.11 The report includes forecasts for UK Tourism. Based on telephone interviews among approximately 500 accommodation establishments and 300 visitor attractions, plans for increased investment in 2013 is to be seen in the following areas:

- Facilities and fittings (41%);
- Special events and exhibitions (36%);
- Marketing investment (32%);
- Staff training (24%); and
- Deals and discounts (19%).

4.12 Given the poor weather conditions in recent years and the impact on visitor spend, the use of advance booking online by outdoor attractions was seen as an important step in mitigating against potential future poor weather conditions.

Future Avenues for Rural Tourism

4.13 A Rural Tourism Action Plan was written by Visit England in 2010. The report aims to improve the potential of the rural tourism offer and bring benefits to local communities and economies. The Action Plan was part of a wider initiative to maximise tourism's contribution to the economy, to employment and to the nation's quality of life, and achieve a target of 5% year-on-year growth in the value of the tourism sector over the next decade. 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 (i.e. not imported in);
- 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.

Tourism in the South West

4.14 In this section we have sought to drill down to look at tourism trends within South West England, drawing on a range of reports and data sources. We consider the visitor offer in broad terms and tourism trends.

Day Visitor Numbers and Spend

4.15 The GB Day Survey is an annual survey of trends in day visitors conducted at a national level. The latest data available was from 2011 and is based on an online survey of over 38,000 persons.

4.16 The 2011 Survey highlighted that day visits generated £141 million of tourism spend in the South West Region in 2010, 9% of the total for England. It indicated day visits in the South West largely follow national trends: the largest proportion of day visits were visiting friends and family (28% of day visits), followed by a general day out to explore an area (13%), going out for a meal (11%) and outdoor activities (9%).

Table 1: Profile of Day Visitors by Types of Visit, 2011

% of Visits by Category	South West Region	England
Visiting friends or family	28%	29%
Going out for a meal	11%	10%
Going on a night out	6%	10%
Outdoor activities	9%	8%
General day out	13%	7%
Going out for entertainment	4%	6%
Special shopping	5%	6%
Going to visitor attractions	6%	5%
Watching live sporting events	2%	4%
Other leisure/ hobbies	4%	4%
Special public events	3%	3%
Special Personal events	2%	3%
Other day out for leisure	5%	3%
Taking part in sports	2%	1%
Day out to health/beauty spa	1%	1%
Total	100%	100%

Source: GB Day Visitor Survey (2011)

4.17 It is evident from the table above that there is a lower level of night time activity and a higher level of day tripping in the South West compared the rest of England.

4.18 Of day visitors in 2011, 60% were from the South West, 11% from the South East, 9% from London and 6% from the East of England. There is a notable flow from the greater South East to the region for day visits.

4.19 An overwhelming percentage of the day visitors in the South West used a car as their main source of transport (73%), with 10% travelling by coach or train. The proportion travelling by car was above average.

4.20 Of the visitors surveyed, a third of visits (32%) to the South West last 6 or more hours (compared to a UK average of 27%).

Table 2: Duration of Stay for Day Visitors, 2011

	South West (%)	England (%)
3-4 hours	35%	38%
4-5 hours	21%	24%
5-6 hours	11%	12%
6 + hours	32%	27%
Total	100%	100%

Source: GB Day Visitor (2011)

Trends in Overseas Visitors to the South West

4.21 In the UK as a whole, the average international tourist spends £580 per visit and stays 7.6 nights. The highest number of visits and spend is in leisure (£6.6bn), followed by followed by business (£4.bn) and visiting friends and family (£3.6bn)[12].

4.22 Based on data from the International Passenger Survey, there were approximately 2,088,000 international visitors to the South West Region in 2011, generating an estimated spend of £955 million. Data is not available which allows us to breakdown this spend.

The State of Tourism in the South West

4.23 The *State of Tourism in the South West* report was written in 2003. It identifies that the South West is the most visited region in the UK for domestic tourism outside of London.

4.24 The State of Tourism Report used survey data to track trends in visitor trends over the 1996 – 2001 period, reporting an increase in short holidays in the South West by 48%, a decrease in long holidays by 14%, stable numbers in business tourism and increases in VFR (visiting friends and families tourism). Looking forward, it predicted growth between 2003-13 in the following areas:

- Short breaks would increase by 58%
- Business trips would increase by 41%
- Visits to friends and relatives would increase by 71%

4.25 Whilst this report is now somewhat dated, the predicted trends suggest that short breaks has been considered to be a growth area for UK tourism some time, and that this is borne out in the recent trends at the national level. The national evidence also provides supporting evidence of growth in business trips and visits to friends and family and the evidence suggests that these trends can be expected to continue.

2011 How's Business? Survey of Tourism Businesses

4.26 Looking at more recent surveys in South West England, the 'How's Business?' Survey, published in February 2011, considered the performance of businesses in the region engaged in the tourism sector. Overall the survey showed that equal numbers of respondents believed that visitor numbers had increased, stayed the same and decreased. More than half of those surveyed believed that visitor spending was down on the same time in 2010.

4.27 The number of visitors to leisure attractions had increased from the previous year.

[12] Tourism Alliance from the International Passenger Survey, Office for National Statistics, 2011

4.28 Looking more specifically at the number of visitors by accommodation type, the numbers of visitors to self-catering accommodation and holiday parks appeared to increase whilst there appeared to be a decrease in stays in B&B accommodation. The business turnover data confirmed these trends.

4.29 Overall the survey findings suggested that the number of overseas and domestic visitors in the South West had broadly stayed the same in 2011 from 2010.

4.30 Looking forward the survey assessed how optimistic tourism businesses were about their future prospects. Accommodation establishments and visitor leisure attractions reported an above average optimism score. In particular, **visitor and leisure attractions and self-catering accommodation and holiday parks were seen to offer the best prospects for growth**.

Implications of National and Regional Trends

4.31 The UK economic recession has clearly impacted on the tourism industry in the region. Recession and weak economic growth since 2008, coupled with inflationary pressures, has led to a net reduction in households' disposable income. Households have been forced to cut their discretionary spending.

4.32 There have been varying impacts of this. Some households may have decided to holiday closer to home rather than travel abroad, with some growth of 'staycations' although it is unclear whether this trend will be sustainable in the longer-term. However, the evident trend in the UK tourism industry appears to be of a growth in short-breaks in particular. The data suggests that the larger and paid attractions have been outperforming smaller attractions. It continues to point to a notable degree of seasonality in visitor numbers and spend, which result in significant seasonal and casual employment in the sector.

4.33 Across the UK, the over 35s category has become increasingly important to domestic tourism (especially regarding holiday trips) and the importance of this demographic (which includes retired households) looks likely to continue. Visits to friends and families and business tourism (for example attendance at conferences and exhibitions) have also increased in recent years and also have future potential. Short activity breaks have shown more resilience compared with longer tourist trips, with trips of between one and three nights becoming increasingly common.

4.34 Looking at the UK, there are opportunities to enhance rural and outdoor tourism in particular, albeit subject to the weather, including walking and 'Glamping' facilities and also the promotion of local events and concerts as was highlighted in the Rural Tourism Action Plan. South West Region leisure attractions, self-catering accommodation and holiday parks in particular are shown to have growth potential.

4.35 The natural environment is something the South West Region, including Mid Devon, should take full advantage of to maximise the potential of sustainable rural tourism in the future. In addition, 'slow tourism' defined as '*Tourism which involves making real and meaningful connections with people, places, culture, food, heritage and the environment*'[13] is something that Mid Devon could benefit from.

[13] Carl Honore cited in http://www.insights.org.uk/articleitem.aspx?title=The%20Slow%20Route%20to%20New%20Markets

5 RESULTS OF STAKEHOLDER CONSULTATION

5.1 We have sought to draw together the review of the tourism offer in Mid Devon, the analysis of national and regional trends in the tourism sector, and consultation with key stakeholders to consider how Mid Devon's tourism offer could be developed.

5.2 It should be noted that the summer months of 2013 saw good weather, which was accompanied by higher visitor numbers and a healthy tourist economy compared with previous years. Despite above average inflation (which has eroded disposable incomes), there is still an appetite for tourists holidaying in the UK.

5.3 In preparing this report, GL Hearn have consulted with the following stakeholders:

- Visit England
- The Heart of Devon Tourism Partnership
- Markets Manager (Tiverton)Regeneration and Enhancement of Cullompton
- The Blackdown Hills Business Association
- Blackdown Hills AONB
- Millhayes, Cullompton (fishing destination)
- Managers of key tourist attractions in Mid Devon including:
    - Tiverton Museum of Mid Devon Life
    - Tiverton Castle
    - Tarka Line
    - Abbotshood Cycle Hire
    - Tiverton Canal Company
    - Yealstone Vineyard
    - Bickleigh Mill
- Hotels and B & Bs including:
    - Lodgehill Hotel
    - The Arlington Hotel
    - Howden House B & B
    - Wishay Farm B & B
    - The Old Bakery B & B
    - Combe Lancey Farmhouse B & B
    - Travelodge
    - Zeacombe Farm House Caravan Park
    - Yeatheridge Farm Caravan Park
    - Poachers Pocket

What is going on in the Tourism Sector?

5.4 Conversations with key stakeholders suggested that the tourism sector is not felt to be currently performing as well in the South West region compared with other regions. Whilst there has been an increase in overseas tourist numbers in some UK regions, with the weak pound giving a favourable exchange rate for overseas tourists, this was not said to be the case in the South West. Rural destinations across the South West were said to be performing particularly poorly. It was thought that this might be because of the time taken to travel to the South West Region from other parts of the UK (although Mid Devon is well located than other parts of the region with the M5 and mainline running through east of the District.

5.5 Generally, it was believed that tourists come to Mid Devon from all over the UK although it was believed that most come from the South West e.g. Bristol. One stakeholder commented that keeping track of where visitors are from is increasingly difficult with the use of mobile phones (as mobile phone numbers do not have a dial in code showing where visitors live.)

5.6 The hotel and B & B owners/managers consulted also said that a number of visitors to the area are businessmen, people spending time with family members who live in the area or people who are attending weddings. In addition, a number of visitors stay in Mid Devon on route to other destinations, notably Cornwall and stay in the area for one night.

5.7 Whilst there are a number of families who stay in the area (especially during summer months), a larger number of visitors are over 45 years of age. Stakeholders noted that there is a lack of secondary school students and young professionals who visit the area, suggesting that younger people and families with teenage children tend to go to coastal areas instead.

5.8 At a time when the UK's economy is recovering, value for money attractions were said to be important. Reasons for the lower than average spend in Mid Devon were thought to be because the visitors are staying with relatives (and do not spend money on accommodation) and many take part in low cost activities, such as walking and cycling, and make use of discounts and annual passes (e.g. for the National Trust).

5.9 A number of stakeholders said that most tourists arrive in Mid Devon by car. Some noted that improvements in public transport (especially the frequency of bus services) may encourage local visitors to travel by more sustainable means. However, as many visit Mid Devon on route to other destinations, this is unlikely to change the mode of transport of tourists who travel from further afield. As mentioned, in an area accessed mainly by car, increasing fuel prices may impact on travel patterns/distances.

5.10 Activities such as shooting and horse riding were said to be ‘niche’ but popular with certain groups. Some stakeholders said that the cost of these activities act as a deterrent and others noted that there are other riding facilities nearby, in Somerset for example, which are perceived to be better. Another stakeholder noted that safety concerns (e.g. the level of traffic) make visitors cautious of horse riding in the Mid Devon area.

5.11 A number of stakeholders commented that tourism offer in Mid Devon is very weather dependent, which has had a negative impact on rural, outdoor attractions. It results in fluctuations in visitor numbers and spend year-to-year. Tourist activities which are particularly reliant on good weather conditions are those associated with the canal, cycling and walking. Partially due to poor weather conditions (and as a result of a targeted marketing in the local press on the internet, twitter etc.) indoor attractions such as Tiverton Museum of Mid Devon Life said that visitor numbers had increased since 2007.

5.12 Linked to changes in the weather, some attractions mentioned how the different seasons impacted on the number and type of visitor to the attractions. For example, Bickleigh Mill mentioned that the number of families who visit the attraction is highest in summer whilst a larger number of more mature visitors are seen during other times in the year. Bickleigh Mill was shown to be more resilient than other attractions to the winter months as it offers a Christmas shopping and food attractions. In short, **the most successful attractions are prepared for and adapt for all four seasons**, rather than just the summer months.

5.13 Poor weather conditions have also had a negative impact for certain types of accommodation, particularly campsites. However, yurt and glamping holidays (luxury camping) have increased in popularity in recent years and support tourism in rural areas, encouraging visitors to enjoy the countryside in Mid Devon. However, similarly to camping, glamping is weather dependent and the number of glampers is small. Whilst self-catering accommodation is less weather dependent, there was a perception that there is a reasonable level of supply for this type of accommodation in the District.

5.14 Activities with a unique selling point have also been popular, such as courses for visitors on how to rear pigs etc. Use of innovative ways of marketing, with websites such as Kids Go Free, and other discounts, have been key to boosting numbers to attractions for families.

5.15 Sourcing food locally is good practice for sustainable tourism as it provides a good food experience for visitors and benefits rural businesses. In addition, a high proportion of visitor spending (excluding accommodation) is on food and drink.

5.16 The movement of the Tourist Information Centres was said to have been contentious and some stakeholders believe that much could be done to improve the place marketing of Mid Devon. Indeed, one stakeholder commented that Mid Devon does not have a clear identity.

5.17 Looking at business tourism, the industry appears to have taken a number of actions to help promote growth, including:

- enhancing environmental sustainability;
- enhancing the IT provision in accommodation establishments;
- upgrading the accommodation offer; and
- sourcing food locally.

Predicted Growth Areas

5.18 The potential for growth in visitor number and spend in the region, and in Mid Devon, is dependent to a notable degree of wider (macro-) economic conditions. Stakeholders pointed to prospects for growth in domestic (as opposed to international tourism). However, high weather dependency continues to be a limiting factor on long term breaks and will impact the success of some attractions.

5.19 Predicted growth is anticipated to be in short and mid lengths stays / trips, primarily from people resident within the South West region. Future growth in visitor numbers are expected to arise principally from visitors who live 20 – 40 km from tourist attractions.

5.20 However, some narrow roads and the perceived difficulties of access to the area are considered by key stakeholders to be constraints to growth in the tourism sector. This said, the District does have some significant assets in terms of the volume of people/ potential visitors passing through the area – both along the M5 (past Cullompton and Tiverton Parkway) and along the A361 North Devon Link Road. This was perceived as an opportunity.

5.21 A key growth opportunity is to increase the number of people who ‘stop and spend’ in the District. There was not a unified response in how this could be achieved from the stakeholders but some thought included that enhancing the quality local food offer could increase consumer spend. Others believed that a more significant attraction is needed to give passers by a reason to stop in the District (examples of such attractions could include a major climbing centre with an indoor wall / high ropes centre / a zoo / water park etc.).Most visitors are local and a high proportion of UK visitors stay with friends and family. Some stakeholders believed that that an increase in the provision of budget hotel accommodation would be more likely to attract visitors, as the cost of accommodation was seen as a deterrent to some visitors. Whilst there are a number of B & Bs in the area, increasing running costs may result in a decrease in the number of B & Bs looking forward.

5.22 Future growth is expected to be in attractions which have distinctive characteristics. These include restaurants/ cafes and retail facilities with a local food offer. Other opportunities include growth potential for facilities, such as Tiverton Castle, where the attraction is more interactive compared with similar destinations. Poor marketing and under selling of historic attractions (such as museums) has in the past limited the number of visitors.

5.23 To encourage people to visit local attractions, leaflets are needed in hotels. A conversation with a large hotel chain suggested that there were few leaflets in the lobby area for Mid Devon attractions, with the majority of leaflets advertising attractions in adjoining districts. Another way in which businesses and attractions can promote themselves is through the Trip Advisor website. Yearlstone Vineyard mentioned how this had been a useful tool in increasing the number of visitors in the past year. Many tourists who live outside of the South West use this, and similar websites, as a starting point to decide where to stay and eat.

5.24 Some felt that the beautiful countryside and peace and quiet was a key selling point for Mid Devon, especially as many visitors from the area live in cities. National Trust properties, the canal, the museums and the attractive historic towns are other things which should be marketed. Popular attractions were said to be the canal and railway and Diggerland for families, with the National Trust properties and the National Park and countryside for older people.

5.25 The three market towns have the potential to provide an excellent heritage offer for tourists. There are some initiatives on-going, including the Cloth Trade Project in Cullompton which is being launched to attract visitors and build upon the town’s heritage offer. This will involve interactive boards for people to use situated around the town and in places of interest.

5.26 It was thought a focus on the heritage of the district would be particularly attractive to older groups. Given the aging population in the South West Region, attractions for the elderly were thought to be a growth area, especially as some have a disposable income. In addition to the market towns, it was thought that National Trust properties, which provide a heritage offer will continue to be popular with mature visitors.

5.27 Market town events such as those in the Tiverton Pannier Market were considered by stakeholders to be performing well and attracting an increasing number of visitors. The artisan food offer in Tiverton is particularly popular, with unusual foods and rare breeds of meat on offer. Again, these have been popular with visitors wanting ‘something different’ from their trips. There is scope for these events to further improve the experience for visitors, with “pop up” restaurants and provision of social space within the market towns. There is an opportunity to encourage potters and blacksmiths to local market town events to make them livelier and so that visitors can ‘see things happening.’

5.28 Despite poor weather conditions, some stakeholders believed that focusing on the “rural offer” (e.g. around the Blackdown Hills) in and around Mid Devon will be important to attracting future visitors. However, it needs to be ensured that sustainability is promoted, especially in and around the Blackdown Hills and any measures to promote visitor numbers will need to be in harmony with the environment and be small scale. Traditional activities, such as farming, and measures to aid the production of local food should be promoted. In addition, improvements of the public transport network to Blackdown Hills are needed.

5.29 Some believed that improvements in the canal and cycle provision would boost visitor numbers. Indeed, one stakeholder noted the great walks that Mid Devon offers which could be capitalised on. Provision of activity holidays / weekends away may encourage younger people to stay in the area. One stressed that these needed to be fun and easily visible on smartphone apps and websites e.g. http://www.yumping.co.uk/. Another stakeholder noted that cycling in particular could be promoted and that the area has seen an increase in cyclists in 2012, which looks likely to increase further. Encouraging charity runs and cycles in the area as well as activity weekends could be another way to attract visitors.

5.30 Having web pages showing various cycling routes and key attractions / places to eat on the routes is something that was thought to be something that could be helpful for visitors. In addition, some stakeholders believed that improving footpaths and increasing maintenance may make walking more accessible. Improving signage on the walking routes was thought to be needed.

5.31 Some stakeholders believed that more indoor and all weather attractions are needed. Whilst there are things to do for visitors in larger towns such as Tiverton when it rains, the stakeholders whom we engaged suggested that there are a limited number of things for visitors to do elsewhere when weather conditions are cold and wet. In addition, several stakeholders emphasised the need for family friendly attractions in the area, as a number of visitors are in the area to see and stay with relatives and would enjoy day trips with older and younger relatives.

5.32 As mentioned, there is believed to be some scope for encouraging niche holiday breaks focusing on fishing and horse riding but levels of interest in this area is not expected to result in a dramatic increase in tourists, especially as some believe that facilities in nearby locations are better than in Mid Devon.

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6 CONCLUSIONS

6.1 Mid Devon District's key tourism assets are the three market towns, its natural and green infrastructure for outdoor pursuits, a number of castles and stately homes, and various family attractions. Any strategy for the development of the tourism offer in Mid Devon needs to build on the characteristics of the area and the existing tourism infrastructure and support the growth and development of this.

6.2 Existing tourism facilities within the District largely draw on a visitor pool from within the region, and particularly within a 20-40km catchment. However there are a number of strategic routes through the District – the M5 and A361 in particular. There should be an opportunity to develop the tourism infrastructure around these key links to encourage a greater proportion of people to "stop" or break their journey in the area, for instance to visit a local attraction, market or retail facilities or to stay. This opportunity builds on the District's location at Gateway location to Exmoor and the North Devon Coast; and on the route to Dartmoor, the South Devon Coast and Cornwall from much of the UK.

6.3 The opportunity which exists seems to particularly relate to encouraging day visits, as well as short stay trips (such as long weekends).

6.4 A multi-pronged approach would seem appropriate to us. We have set this out below.

Strand 1: Marketing the Market Towns and Surrounding Areas

6.5 The market towns are key centres within the District which provide a range of 'things to do.' There would appear to be opportunities to work with local stakeholders to develop the offer, including by:

- Investing in existing attractions to provide interesting and interactive opportunities which cater for both children and adults/ older persons;
- Developing the markets offer, providing a clearly-defined 'offer' focused on quality local-sourced produce and craft goods;
- A seasonal programme of events, building on the existing programme of events/ fayres and festivals and working with local community groups;
- Nurturing the food offer – developing the facilities and reputation for buying good quality food, and eating it, including both retail facilities/ farm shops and restaurants/ gastro pubs (including pop-up restaurants);
- Promote and enhance the marketing of food and wine schools in Mid Devon.

6.6 The market towns should be key outlets for selling locally-sourced food and craft products and have a range of interesting 'things to do' for people of all ages. The marketing of this is then critical and could involve publicity, signage and branding potentially linked into initiatives at a wider Devon level. Marketing should include improving the signposting of attractions, facilities, events, accommodation and restaurants on relevant national websites, as well as greater cross-marketing locally through leaflets and local publicity materials.

Strand 2: Developing the Accommodation Offer

- The stakeholder discussions and analysis undertaken suggest that the selective development of the accommodation offer could help to increase overnight stays in the District, and capitalise on its location astride key transport routes. The opportunity appears to be to capture growth potential in: Enhancing the offer of more good quality budget hotel accommodation in the District;
- Developing selected opportunities for higher quality, bespoke accommodation such as smaller guest house accommodation and accommodation provision in unusual attractive, historic properties.
- Yurt and glamping holidays, providing a high quality residential experience for people looking to get close to nature.

6.7 There would seem to be a particular opportunity to encourage visitors travelling through the area to stop, through provision of accommodation close to the M5 and A361 gateways to Devon.

Strand 3: Maximising the Natural Offer

6.8 Devon's core asset is its natural environment, and this is a key driver of visitor trips to the County. Mid Devon is a primarily rural area with significant green infrastructure assets as this report has identified. The opportunity here is to increase visits through:

- Investing in the quality of routes, for both walking and cycling, and expanding the network thereof;
- Encouraging and investing in the development of associated infrastructure, such as cycle hire facilities and signage;
- Publicity material identifying the opportunities which exist for walking and cycling, including maps with suggested routes; and
- Encouragement of countryside pursuits e.g. fishing, shooting and horse riding and potentially of adventure sports/weekends or charity challenges possibly involving cycling. This is potentially an important growth area which builds on Mid Devon's key strengths, including its strategic accessibility.

Strand 4: Slow Tourism

6.9 Slow Tourism, as its name suggests is a branch of tourism where tourists take a relaxed approach during trips. Slow tourists tend to minimising travelling and associated harm to the environment whilst maximise the time for their trips. There is, therefore, the potential to retain visitors locally and for longer. It arguably a market for older people, stressed out couples and families. In Mid Devon, there is a potential to maximise the opportunity in this sector in a number of areas including the following (in addition to the actions identified above):

- Wildlife watching in the Blackdown Hills AONB, including provision of specific guided activiites;

- Promoting conservation volunteer holidays and conservation projects which visitors can sign up to participate in;
- Encouraging the production and consumption of slow food (high quality and sustainably produced food) at local restaurants, markets, producers, local beer/wine and specific marketing of this offer.

6.10 There is an opportunity to develop the District's tourism offer to cater to a variety of needs, but looking forward, the evidence points to the potential for growth in spend particularly from the over 35s market. Market town events support businesses and farms in rural areas (by providing a market for farmers to sell their food products).

Strand 5: Catching Passing Tourists / Major Tourist Facility

6.11 Mid Devon has an excellent strategic location, particularly with the mainline railway and the motorway (M5) running through the east of the District. It is also accessible from the regional airports at Exeter and Bristol. Given the volume of tourists who pass through Mid Devon on route to other destinations, such as North and South Devon and Cornwall, and as recognised by stakeholders, more could be done to encourage these tourists to stop en-route and increase the length of time (and money) tourist spend in Mid Devon.

6.12 Based on the analysis set out, there could be opportunity for the development of new tourism infrastructure or facilities to increase visitor numbers and spend. Based on the evidence set out, the opportunity here could be quite varied, but could include:

- Delivery of a new man-made tourism attraction, such as an amusement park or a major climbing/ high ropes course to cater for families and/ or the adventure market; and/or
- Development of a tourism facility which showcased local food and produce, linked to the slow tourism agenda and the strong agricultural economy in Devon.

6.13 A major facility or attraction would also be likely provide a number of associated services, such as a visitor attraction or activity, retail space, accommodation and café/restaurant floorspace; with a critical mass of 'things to do or stop for' being important in attracting visitors and maximising economic benefit. The precise nature of the facility is difficult to precisely predict, and any proposal would need to be supported by bespoke market research, but it could also link to Strand 2: Developing the Accommodation Offer.

6.14 Proposals for any major facility would need to considered carefully in terms of any impacts (economic impact or trade) on other parts of the district, and particularly the market towns, and potentially on other adjoining areas, depending on the scale or focus of any major investment, in view of the Duty to Cooperate required of local authorities by the 2011 Localism Act.

Strand 6: Fun for the Kids

6.15 The final area of activity where there appears to be growth potential is in providing interactive, child-friendly activities to attract the family trips which are currently not happening in Mid Devon. This requires a combination of:

- An appropriate offer with a variety of activities, which are priced competitively; and
- Innovative marketing and discounts to attract trade.

6.16 Whilst the landscape and natural environment is a key driver for a number of visitors to Mid Devon and could be a driver for sustainable rural tourism, the unpredictability of the British weather poses a constraint. Developing an "all weather" offer and facilities in Mid Devon with an appeal across a range of visitor groups is an area where there could be future growth.

APPENDIX A: Accommodation within 10 Miles of Mid Devon's Main Towns

Source: Trip Advisor / Heart of Devon

Using the Postcodes EX15 for Cullompton, EX16 for Tiverton and EX17 for Crediton

Date of search: 24.09.2013

Figure 8: Hotels and B&Bs

Hotels / B and Bs	Postcode	Nearest Town using Postcode
Bookbinders B&B	EX15 1ND	Cullompton
Wishay Farm	EX15 1PE,	Cullompton
Langford Court North	EX15 1RG	Cullompton
Park 'n' Lodge	EX15 1SA	Cullompton
Newcourt Barton	EX15 1SE	Cullompton
Southill Barton	EX15 2AW,	Cullompton
Orway Crescent Farm Bed & Breakfast	EX15 2EX	Cullompton
Muddifords Court Country House	EX15 2QG	Cullompton
Weir Mill Farm	EX15 2RE	Cullompton
The Old Bakery B&B	EX15 3AN	Cullompton
The Ostler Inn B&B	EX15 3EB,	Cullompton
Waterloo Cross	EX15 3ES	Cullompton
Hornhill	EX16 4PL	Tiverton
Burrow Farmhouse	EX16 4PW	Tiverton
B&B Ashley Gables	EX16 5PA	Tiverton
Lodgehill Hotel	EX16 5PA	Tiverton
Howden House Bed and Breakfast	EX16 5PB	Tiverton
Angel Guest House	EX16 6NU	Tiverton
Bridge Guest House	EX16 6PE	Tiverton
Brambles Bed and Breakfast	EX16 7DS	Tiverton
West Pitt Farm	EX16 7DU	Tiverton
Travelodge Tiverton	EX16 7HD	Tiverton
Best Western Tiverton Hotel	**EX16 7HD**.	Tiverton
The Hartnoll Hotel	EX16 7RA	Tiverton
Two Moors Way Vegetarian B & B	EX16 8AA	Tiverton
Partridge Farm B&B	EX16 8BN	Tiverton
Fernside Bed And Breakfast	EX16 8BP	Tiverton
East Barton	EX16 8HD	Tiverton
Great Bradley Farm	EX16 8JL	Tiverton
Old Ford House - Cruwys Morchard	EX16 8NA	Tiverton
The Oaks Bed and Breakfast	EX16 8PE	Tiverton
The Oaks	EX16 8PE	Tiverton
Newhouse Farm	EX16 8QB	Tiverton
Barleycorn House B&B	EX16 9AZ	Tiverton
Harton Farm	EX16 9HH	Tiverton
The Bark House	EX16 9HZ	Tiverton
Red Deer House	EX16 9JE,	Tiverton

Threadneedle	EX16 9JH	Tiverton
Wonham Barton	EX16 9JZ	Tiverton
Blackberries	EX16 9ND	Tiverton
Quoit-at-Cross	EX16 9PJ	Tiverton
Stoodleigh Court Coach House B&B	EX16 9PL	Tiverton
Taw Vale	EX17 3BU	Crediton
The Great Park Farm	EX17 3PR,	Crediton
Combe Lancey Farmhouse B&B	EX17 4EA	Crediton
Hayne Farm	EX17 4HR	Crediton
The Lamb Inn	EX17 4LW	Crediton
Thelbridge Cross Inn	EX17 4SQ	Crediton
The Stable Bed & Breakfast	EX17 4TT	Crediton
The Cobbles B&B	EX17 5AL	Crediton
North Hollacombe Farm	EX17 5BS	Crediton
Knowle Barton	EX17 5BX	Crediton
The New Inn	EX17 5BZ	Crediton
Brickmoor Bed & Breakfast	EX17 5JA	Crediton
Warrens Farm Bed and Breakfast	EX17 5JD	Crediton
The Linhay at Lower Chilverton	EX17 6BH	Crediton
The Waie Inn	EX17 6DF	Crediton
The Barn - Rodgemonts	EX18 7ET	N / A
Fox & Hounds Country Hotel	EX18 7JZ	N / A
Manor House Hotel	EX20 4NA	N / A
The Coach House	EX24 6RJ	N / A
The Inn on The Green	EX5 2EE	N / A
The Arlington, Hele	EX5 4PW	N / A
Fursdon Estate	EX5 5JS	N / A
Frogmill Bed and Breakfast	EX6 6ES	N / A
Woodleigh Coach House	EX6 6JL	N / A
Godford Farm	EX14 3PW	N / A
Shippens	EX14 9JZ	N / A

Note: Holiday rentals have been excluded from the table

Figure 9: Speciality Lodgings

Speciality Lodging	Post Code	Nearest Town using Postcode
Fulfords Farm	EX15 1PD	Cullompton
Acorns Naturist Retreat	EX16 8EL	Tiverton
South Coombe Country Cottages	EX16 8QL	Tiverton
West Pitt Farm	EX16 7DU	Tiverton
Tiverton Castle	EX16 6RP	Tiverton
Longham Farm	EX16 7RU,	Tiverton
Bickleigh Castle	EX16 8RP	Tiverton

APPENDIX B: Campsites within 10 Miles of Mid Devon's Main Towns

Source: Caravan and Camping Club / Campsite Review website / Love Camping.co.uk

Date of Search: 02.10.2013

Using the Postcodes EX15 for Cullompton, EX16 for Tiverton and EX17 for Crediton

Campsite	Postcode	Nearest Town using Postcode	Size
Newcourt Baron	EX15 1SE	Cullompton	Large (3.5 acres)
Verbeer Manor Caravan and Camping Park	EX15 1SE	Cullompton	Large (20 Pitches)
Goodiford Mill Fishery and Leisure Park	EX15 2AS	Cullompton	Large (20 pitches)
Forest Glade Caravan & Camping Park	EX15 2DT	Cullompton	Large (80 pitches)
Blackdown Yurts	EX15 2HN	Cullompton	No size information available
Acorns Naturist Retreat	EX16 8EL	Tiverton	No size information available
West Middlewick Farm	EX16 8NP	Tiverton	Large (30 Pitches)
Four Ponds Fishery	EX16 9BU	Tiverton	Small (1 acre)
Zeacombe House Caravan Park	EX16 9JU	Tiverton	Large (50 Pitches)
Salmonhutch Coarse Fishery	EX17 3QL	Crediton	Small (N / A)
Oh What a View Campsite	EX17 4BH	Crediton	Small (0.5 acres)
Yeatheridge Farm Caravan Park	EX17 4TN	Crediton	Large (85 pitches)
The Waie Inn	EX17 6DF	Crediton	Small (5 pitches)
Wellbeck Farm & Equestrian Centre	EX5 2JA	N / A	Small (0.5 acres)
Rewe Brake	EX5 2PL	N / A	Small (2 acres)
Dartmoor Barley Meadow	EX6 6NR	N / A	Large (63 pitches)
Westford Farm	EX6 6RD	N / A	Large (90 Pitches)
The Field	EX6 7PJ	N / A	Small (0.5 acres)
Gamlins Farm Caravan Park	TA21 0LZ	N / A	Large (20 pitches)
Streamcombe Farm	TA22 9SA	N / A	Small (1 acre)
Waterrow Touring Park	TA4 2AZ.	N / A	Large (50 pitches)
Harmony Wood	EX6 7RX	N / A	Small (1 Acre)
Skinners Ash Farm	EX14 3BH	N / A	Small (0.5 acres)
Marles Farm	EX14 3PJ	N / A	Small (0.5 acres)