

MID DEVON LOCAL PLAN REVIEW 2013 – 2033

Proposed Submission (incorporating proposed modifications) Examination

Inspector: Paul Griffiths BSc (Hons) BArch IHBC

Hearing 1: Tuesday 26th & Wednesday 27th September 2017

Matters and Issues: Policy J27

Statement of Mid Devon District Council

ISSUE 6 If there is a need for the scale of tourist and leisure elements proposed, why is the OSV necessary?

6.1 The “need “ for the scale of the tourism and leisure elements of the allocation are a result of Mid Devon`s ambition to make a step change in its tourism offer and increase its income from the Devon tourism economy from which it currently only receives less than 5%. In order to make that step change Mid Devon has recognised it needs to provide for something of significant scale and something which will be unique in its offer.

6.2 Mid Devon, as identified in its draft Destination Management Plan, seeks to address its weaknesses and builds on its strengths. In order to effectively do that it needs to provide an allocation which can provide a wide tourism offer and one which will be of regional significance. Something that will provide Mid Devon with a unique selling point. The J27 allocation seeks to address some of the strengths and weaknesses highlighted in the Mid Devon Visitor Survey 2016 –Final Report December 2016 Swot analysis (Appendix 1) and the Mid Devon Draft Destination Management Plan 2017 (Appendix 2) some of which are set out below.

- Encourage investment in all day attractions e.g. linked attractions
- Need a ‘wow’ factor for the area
- Mid Devon not seen as an all year round destination
- Perception that Mid Devon has nothing to offer young people and families
- Perceived as a gate way to Devon, pass through area
- Least visited destination compared to all Devon districts
- Plenty of room for growth

- 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
- 6.3 Shopping, as highlighted by Visit Devon and the World Tourism Organisation, is a key element of destination planning and visitor spend. It is an essential element of the multi facility offer that is sought at J27.
- 6.4 The OSV is necessary because it provides funding and revenue to ensure all the elements of the allocation are provided and delivered, including works to the motorway junction. (See Question 7 below).
- 6.5 It is necessary as a key part of the major tourist facility and it meets an unmet regional need for additional comparison shopping floor space, as identified by Lichfields, in a convenient and accessible location.
- 6.6 It is necessary because it makes the J27 tourist attraction uniquely attractive, it provides, together with the other allocation elements, a multi-faceted attraction, which will give Mid Devon its unique selling point.
- 6.7 It provides an easily accessible OSV in Devon, of sufficient size, to attract the higher end fashion retailers. It is on a motorway Junction which sees over 24 million vehicles travel through it each year and close to a mainline railway station, Tiverton Parkway, which is only 14 minutes from Exeter St David's and 12 minutes from Taunton.

Appendix 1

Source - Extract from the draft Mid Devon Destination Plan 2017

	Strengths	Weaknesses
Visitor	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • Lack of range of nightlife/evening entertainment • An ageing visitor profile • Car parking is perceived to be expensive • 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	<ul style="list-style-type: none"> • 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 between the valleys creating stunning views • Peace and tranquillity – pure get away. • Strong food offer, pubs, restaurants, food festivals, farmers markets, local producers. Award winning food events. • Free coach parking in Tiverton, paid for in Crediton. • 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 (links to 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, Star gazing. 	<ul style="list-style-type: none"> • Limited public transport options on Sunday's and bank holidays • Perception that Mid Devon has nothing to offer young people and families • Limited mobile and wifi connection across the district • Lack of events in off peak seasons • Uneven spread of attractions throughout the District. Little paid attractions in Crediton and surrounding area. • Gaps in assets – no farm type attractions, • Limited of low cost accommodation e.g. camp sites. • The LEP do not have any funding streams for tourism at present
Place	<ul style="list-style-type: none"> • 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. • Close proximity to the moors, beaches, city, AONB 	<ul style="list-style-type: none"> • 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,

	<ul style="list-style-type: none"> Active Town Teams in Cullompton, Crediton and Tiverton developing the local offer. Recent review and update of brown signs 	<p>pass through area.</p>
Promotion	<ul style="list-style-type: none"> Good businesses 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 	<ul style="list-style-type: none"> 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
Political	<ul style="list-style-type: none"> Tourism is a growing industry in its own right and contribution tourism makes to the economy Government's view and demands on the industry Visit England's Strategic Framework for Tourism 2010-2020 / Governments Action plan (Aug 2016) VSD / LEP potential to unlock funding 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. 	<ul style="list-style-type: none"> Decreasing industry TPA membership following HOD/ VSD merger School term time holiday-taking regulations
Economic	<ul style="list-style-type: none"> 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 to 	<ul style="list-style-type: none"> Competition from other destinations managing tourism more effectively The true impact of Brexit on visitors and private sector spend and investment is unknown Currency exchange rates Future applications for J27 could have mixed reactions from sector members. Interest rates and the effect on disposable income Relative weak / strength of the pound and the effect on overseas visitors Value of GBP against other major currencies Rate of inflation

	<p>improve communication channels across the district and project development.</p> <ul style="list-style-type: none"> • 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, cycleways, 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	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Customer expectations are changing rapidly • Shifting values in society
Technology	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Wifi discrepancy's across the district

Appendix 2

MID DEVON SWOT ANALYSIS –

Source – Mid Devon Visitor Survey 2016 –Final Report December 2016 – page 9

STRENGTHS	WEAKNESS
<ul style="list-style-type: none"> • Good geographical position with excellent road access from all directions. • 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 – 62% ABC1's including 36% AB's. • High levels of regular repeat visitors. • Eating out, shopping, going for a short walk, visiting family attractions and enjoying the countryside are the most popular activities during a visit to Mid Devon. • Good levels of visitor satisfaction. • Good recommendation score. 	<ul style="list-style-type: none"> • An ageing visitor profile. • Cheaper/less expensive car parking. • Roads/traffic congestion. • Improved provision and cleanliness of public toilets. • Improved signage. • Littering. • Improve range of shops. • Improve range of places to eat & drink/restaurants. • Better public transport/quality of service. • Range of nightlife/evening entertainment.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Broaden appeal to families/intergenerational groups – promote the family attractions within the area and special promotions/offers etc. to increase the family market; increase group size & average length of stay, increase repeat visits. • Relatively large VFR market, particularly amongst staying visitors to Mid Devon - optimise activity and day visits amongst this group to generate additional spend. • Large day visitor on holiday market – work with neighbouring areas to promote what Mid Devon has to offer and increase visits/spending amongst this group of visitors. • Economic uncertainty leading to more 'staycationers'. • A year round destination – good mix of indoor and outdoor attractions/places to visit. 	<ul style="list-style-type: none"> • Customer expectations are changing rapidly. • Competition from other destinations within Devon and the wider South West/UK and overseas. • Economic uncertainty causing consumers to be cash conscious. • Lack of investment in future development of the tourism product. • School term time holiday-taking regulations. • Likelihood to recommend a visit and re-visit will be impacted if lower levels of satisfaction are achieved with all the areas highlighted under the weaknesses above, or indeed for any other satisfaction indicators.