



Tourism Trends in Devon

2007



TOURISM TRENDS IN DEVON 2007

A report on the characteristics and trends of the tourism industry in Devon
from November 2006 to October 2007.

This report has been prepared by the Corporate Consultation Service, Devon County Council, in collaboration with other tourism bodies. The report is specifically aimed at policy makers and persons working in the tourism industry in Devon.

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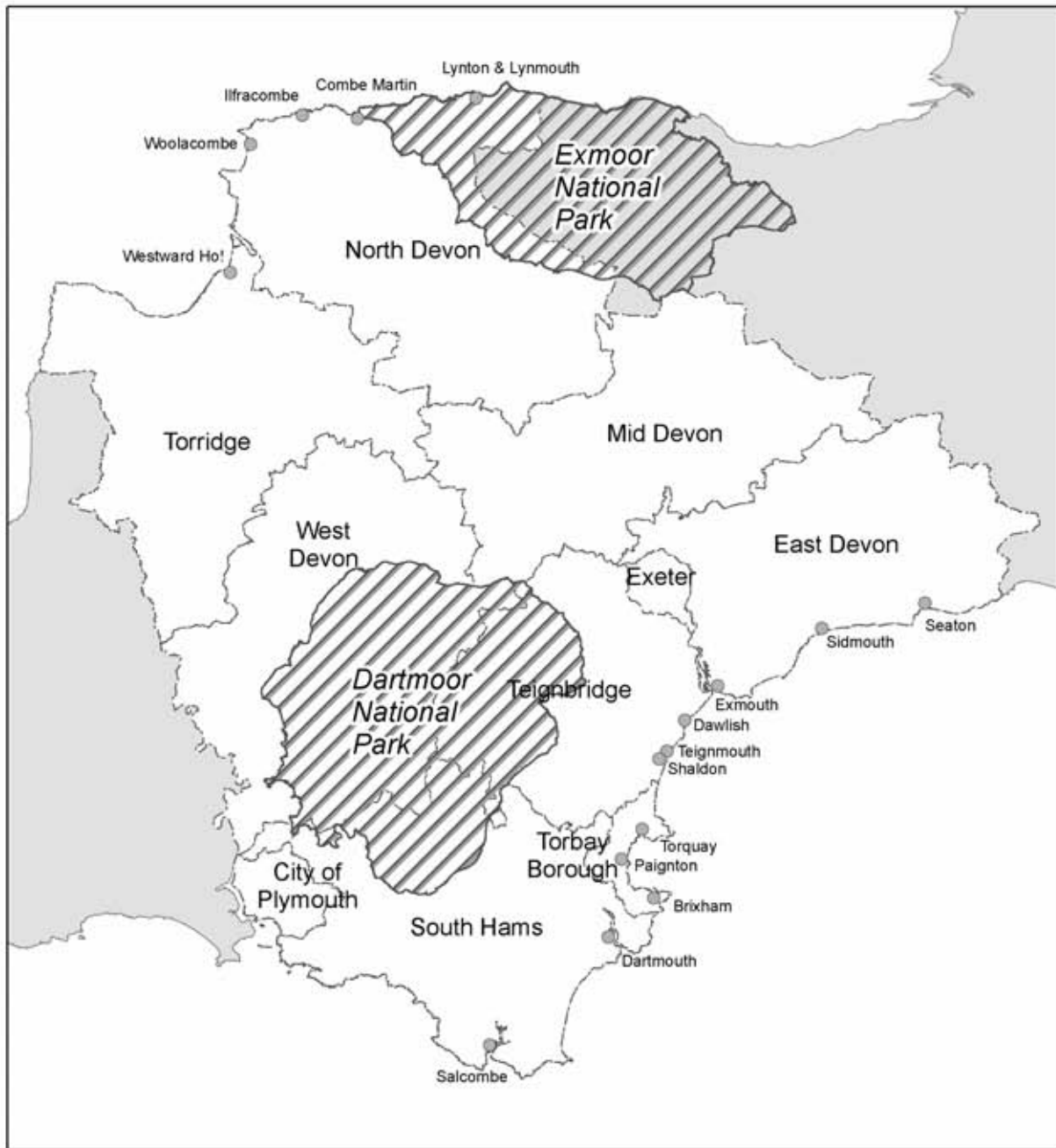
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County of Devon

- Resorts
- ▭ Devon District Council Areas

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Figure 1

TOURISM TRENDS 2007

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Introduction

Tourism is one of Devon's leading industries, making a significant contribution to the local and national economy. The County's outstanding natural environment and heritage provides a variety of year-round holiday opportunities for a wide variety of people. Devon County Council believes that the sustainable development of tourism has a significant role to play in the future prosperity and enhancement of Devon, improving the quality of life for visitors and residents alike.

Devon County Council has collected data on, and undertaken statistical analyses of, visitors staying in the county on an annual basis for more than thirty years. The analysis carried out by the Council has provided valuable information to those involved in delivering tourism, those providing accommodation and other tourist services, as well as those involved with strategic policy decisions. Additionally recent reports have helped Devon gain funding for tourism marketing and development over many years.

The annual publication of Tourism Trends complements market intelligence and research at national, regional and local level. Tourism Trends is part of a continuing process of monitoring and evaluation of specific activities, as well as occasional bespoke research. This combined resource enables Devon's tourism professionals, in both the public and private sector, to guide product development and marketing ensuring Devon's competitive place in the global tourism market.

Since January 1996 the County Council's Corporate Consultation Service has been collecting visitor information on a monthly basis as part of a project jointly funded with all the Borough, District and Unitary Councils, and the National Parks in Devon. Up to the year 2000 this project received substantial financial support from European Objective 2 and Objective 5b funds.

Carried out in a detailed, accurate, and robust way, continuously throughout the year, the survey can be analysed and reported back as the season progresses. The analysis employs a sophisticated methodology to provide trend information for this new series of reports. Continuous improvements to the survey process increase the effectiveness of information collection.

The production of this report would not have been possible without the regular contributions from many people working in the tourism industry. We gratefully acknowledge the co-operation, support, and assistance from the individuals and private companies in the Devon tourism industry, local trade associations, the Unitary Authorities and District Councils.

1. Key Trends

1.1 Tourist nights

- 1.1.1 There was an decrease of 289,000 tourist nights in Devon (-0.9%) for 2007 compared with the same period in 2006.
- 1.1.2 Increases in tourist nights for Devon were observed in December (+4.5%), February (+6.9%) and October (+4.3%), while decreases occurred in July (-4.2%), August (-1.5%) and September. (-5.9%). This could be accounted for by an increase in visitors at school half-terms and at Christmas.
- 1.1.3 There was an overall decrease in tourist nights (-2.0%) for Serviced Accommodation. Decreases were evident for most of the year, except for March and May.
- 1.1.4 There was an overall increase of tourist nights (+1.1%) for Flats & Houses.
- 1.1.5 There was an overall decrease (-1.9%) for Holiday Park units, with April (-5.8%) and September (-6.5%) the worst months.
- 1.1.6 There was an overall increase (+1.0%) for Touring Sites compared to 2006. Occupancy rates were higher in April (+9.0%) and May (+8.3%) and increased by 14% in the September-October period. There was however a decrease through the summer months during June (-2.8%), July (-5.8%) and August (-4.1%).
- 1.1.7 The overall estimate of spending in Devon by tourists staying overnight increased to £1,236.87 million, with an estimated £452.77 million remaining as income to Devon.
- 1.1.8 The capacity of tourist accommodation in 2007 dropped very slightly to around 197,150 bed spaces for all types, excluding any allowance for private households. Touring Sites were the only type of accommodation to show an increased capacity (+2.0%), possibly because this can often be achieved with a minimum of investment.
- 1.1.9 2007 showed a decrease in Exmoor National Park of 26,900 tourist nights - 2.0%) and a decrease in visitors to Dartmoor National Park of 21,300 tourist nights (-2.2%).

A description of the different types of accommodation appears in Section 3 at the end of the report.

1.2 Comments from establishments about the 2007 season

Tables 23 to 30 contain comments made by proprietors comparing 2007 with 2006.

- 1.2.1 Increases in the numbers of overseas visitors were reported by many Holiday Parks and some Touring Sites while there was a decrease in Serviced accommodation with Flats & Houses seeing little change from 2006.
- 1.2.2 Increases for weekend bookings for all accommodation types were reported by a significant percentage of respondents. Holiday Parks reported the largest increase with 52%, Touring Sites with 45% and 34% of Serviced reporting an increase.
- 1.2.3 Increases in midweek breaks were reported by many Holiday Parks (46%).
- 1.2.4 Overall Touring Sites and Holiday Parks reported increases in 1-week stays; Flats and Houses a slight increase and Serviced Accommodation reported a slight decrease.
- 1.2.5 There was little change in the pattern of bookings for 2-week stays, except for a decrease in Serviced Accommodation, where 46% of establishments had no 2-week bookings at all.
- 1.2.6 Over two-thirds of Holiday Parks and almost half of Touring Sites reported an increase in late bookings. Increases were also recorded by around 30% of Serviced and Flats & Houses establishments.
- 1.2.7 Touring Sites & Holiday Parks reported slight increases in staff numbers, whereas all other accommodation reported little change.

A question was asked about which categories of visitors made up a significant part of each establishment's trade and whether there had been more or fewer visitors in each category in 2007 compared with 2006.

- 1.2.8 In general Devon's tourism trade appears to be seeing an increase in trade in all sectors for middle-aged couples and visitors of retirement age and a decrease in all sectors for families with teenage children. For families with younger children there was a decrease for Serviced accommodation and an increase for Holiday Parks. Visits by younger couples were largely unchanged for all sectors.

1.3 Exchange Rates

- 1.3.1 Changes in base exchange rates between the Pound and other selected currencies are shown in Figures 2 to 5. The strength of the Pound has a potential effect both on the numbers of overseas visitors to Devon and the numbers of residents who choose to holiday abroad.
- 1.3.2 Although still at a much lower rate than in 2000-2003 the exchange rate between the Pound and the Euro rose slightly, but steadily, through 2007.
- 1.3.3 The Pound continued to strengthen against the U.S. Dollar in 2007, as it has since 2002, reaching its highest level for over 12 years.
- 1.3.4 The exchange rate between the Yen/Pound continued to rise during 2007.
- 1.3.5 During 2007 the value of the Pound against the Australian Dollar remained fairly constant.

1.4 Summary

Visitor numbers decreased slightly from 2006 to 2007, although there were variations within the different accommodation types, possibly reflecting changes in the type of visitor. There were increases again in Flats & Houses and for Touring Sites with a decrease in numbers using Serviced accommodation and in visitors to Holiday Parks.

Increases in late bookings suggest potential visitors are keeping their options open for as long as possible, probably with an eye on weather forecasts and the costs of alternatives e.g. overseas holidays.

The Pound continued to strengthen against the 1995 base rate for the Euro, US Dollar and the Yen.

2. Tables & Graphs

A new methodology for the United Kingdom Tourism Survey was introduced in May 2006 so data for 2006 onwards in Tables 1 to 3 should not be directly compared to previous years data.

Tourism in the UK

	2003	2004	2005	2006	2007	
Domestic UK Tourism						
Trips	151.0	126.6	138.65	126.3	123.5	millions
Nights	491	409	442	401	394	millions
Spending	26,482	24,357	22,667	20,965	21,238	£ millions
Purpose						
Holiday	60	60	65	63	62	% trips
Visiting friends/relatives	23	22	18	19	20	% trips
Business/conference	15	14	15	15	15	% trips
Other	2	4	2	3	3	% trips
Overseas Visitors to UK						
Trips	24.7	27.8	30.0	30.6	32.8	millions
Nights	203	227	249	273	252	millions
Spending	11,750	12,930	14,122	15,759	15,845	£ millions

Source: South West Tourism Research Department & United Kingdom Tourism Survey (UKTS)

Table 1

Tourism in the West Country

	2003	2004	2005	2006	2007	
Domestic UK Tourism						
Trips	18.2	20.5	21.1	20.3	20.5	millions
Nights	76.4	80.0	82.4	78.3	79.3	millions
Spending	3,472	4,103	3,801	3,682	3,802	£ millions
Purpose						
Holiday	74	70	74	73	71	% trips
Visiting friends/relatives	17	16	14	15	17	% trips
Business/conference	7	9	11	11	10	% trips
Other	2	5	1	1	2	% trips
Overseas Visitors to UK						
Trips	1.88	2.03	2.14	2.23	2.25	millions
Nights	16.2	16.7	17.8	20.0	19.4	millions
Spending	663	714	868	824	840	£ millions

Source: South West Tourism Research Department.

Table 2

Characteristics of UK Tourists Visiting the West Country

	2003 %	2004 %	2005 %	2006 %	2007 %
Age Group					
16-24	10	13	10	11	12
25-34	20	19	19	17	18
35-44	24	26	26	26	24
45-54	17	17	16	17	17
55-64	15	13	14	15	15
65+	15	12	15	14	15
Economic Grouping					
AB	33	35	30	34	36
C1	31	32	36	33	30
C2	18	16	19	18	19
DE	17	16	15	15	15
Mode of Transport					
Car	83	82	79	80	79
Train	6	7	7	8	7
Bus	3	4	3	3	3
Coach Tour	4	2	3	3	3
Plane	-	2	2	3	3
Other	4	3	6	3	3
Region of Origin					
London/South East	30	31	28	26	28
South West	25	26	29	30	33
West Midlands	13	11	11	9	9
Eastern	8	7	6	9	9
North West	7	7	6	5	5
East Midlands	5	6	6	6	6
Wales	5	5	6	7	4
Yorks/Humberside	5	3	5	4	4
Scotland	2	1	2	2	1
North East	1	2	1	1	1

Table 3

Exchange rates £ Sterling/US Dollar

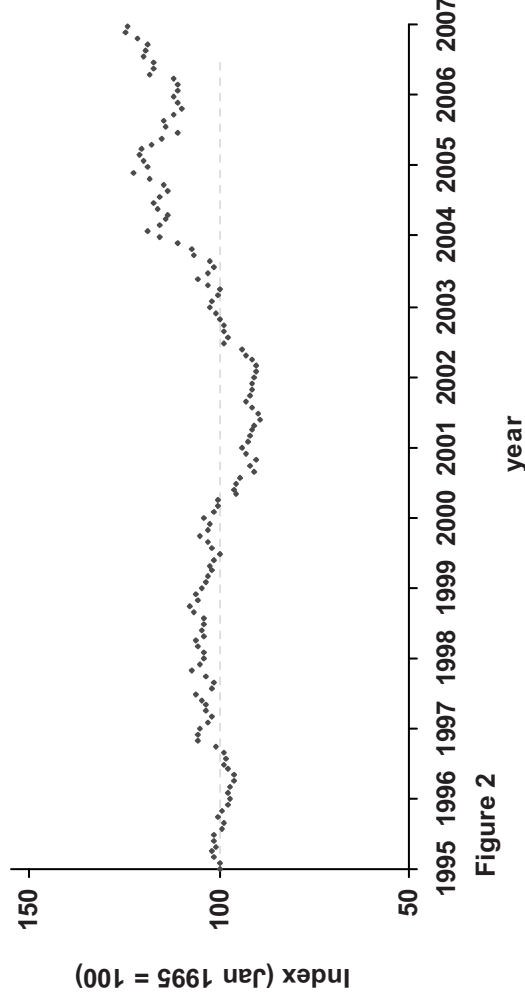


Figure 2

Exchange rates £ Sterling/Euro

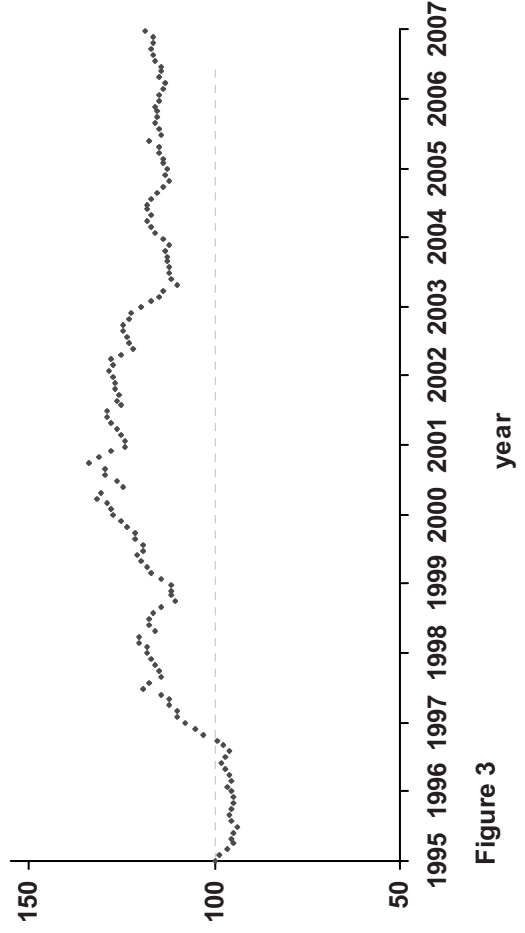


Figure 3

Exchange rates £ Sterling/Japanese Yen

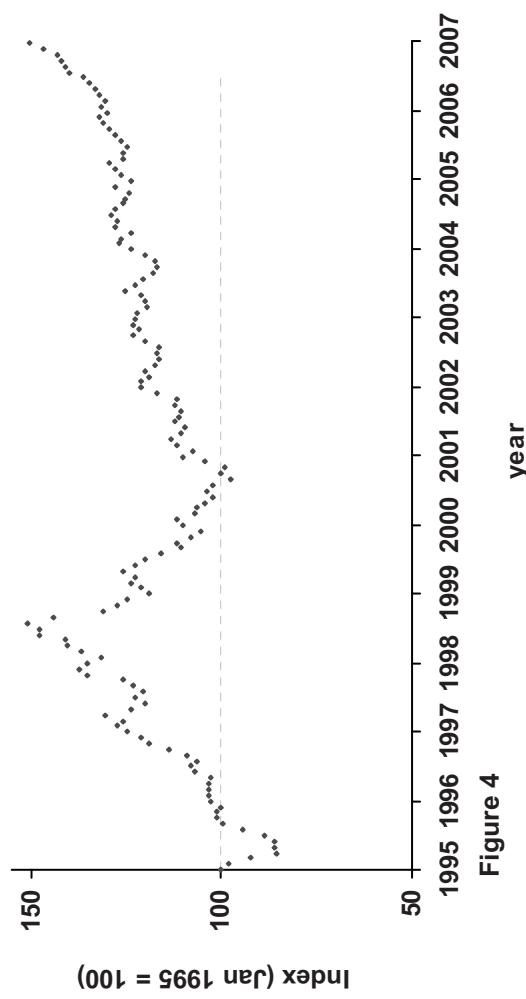


Figure 4

Exchange rates £ Sterling/Australian Dollar

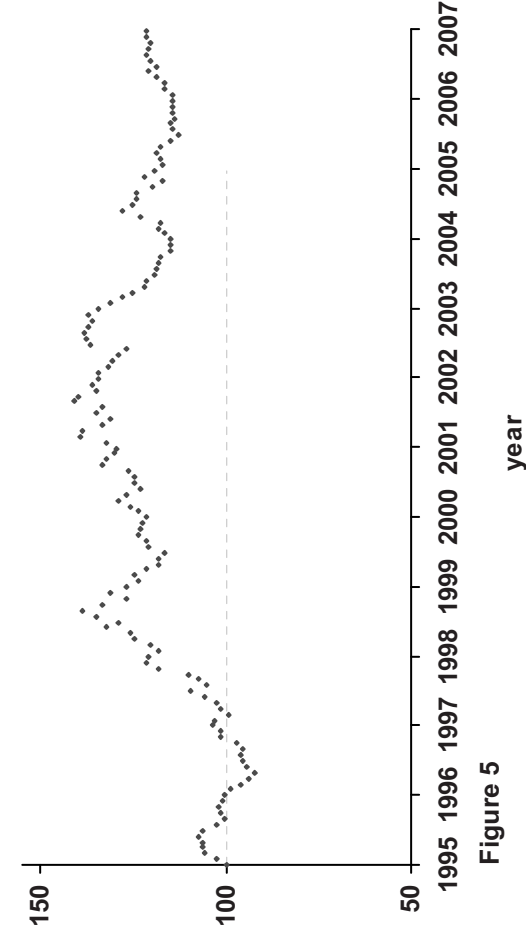


Figure 5

Capacity of Tourist Accommodation in Resorts/Tourist Centres (2007)

Bed Spaces

	Serviced	Flats & houses	Holiday Park units	Touring pitches	Total
Resorts					
East Devon					
Exmouth	1,220	380	7,470	910	9,980
Seaton	210	40	970	1,000	2,220
Sidmouth	1,390	280	280	660	2,610
North Devon					
Combe Martin	260	170	570		1,000
Ilfracombe	2,950	490	2,250	1,500	7,190
Lynton/Lynmouth	1,140	260	250	750	2,400
Woolacombe	1,030	850	4,390	5,760	12,030
South Hams					
Dartmouth	590	570	1,080		2,240
Salcombe	450	340	260		1,050
Teignbridge					
Dawlish	420	280	5,450	6,220	12,370
Teignmouth/Shaldon	760	500	1,080	100	2,440
Torbay					
Brixham	560	520	4,710	780	6,570
Paignton	4,820	3,070	5,800	4,380	18,070
Torquay	13,080	3,630	1,790		18,500
Torrige					
Westward Ho!	450	300	1,890	310	2,950
Tourist centres					
Barnstaple	700	70			770
Exeter	2,530	90			2,620
Plymouth	5,170	340	0	950	6,460
<i>Total in resorts</i>	<i>37,730</i>	<i>12,180</i>	<i>38,240</i>	<i>23,320</i>	<i>111,470</i>
Outside resorts					
East Devon	2,510	1,550	5,050	6,790	15,900
Mid Devon	1,280	630	250	1,600	3,760
North Devon	2,140	2,620	3,520	10,780	19,060
South Hams	3,340	4,010	4,380	11,570	23,300
Teignbridge	2,170	820	1,320	5,450	9,760
Torrige	1,450	1,610	2,470	1,090	6,620
West Devon	3,190	990	920	2,180	7,280
<i>Total outside resorts</i>	<i>16,080</i>	<i>12,230</i>	<i>17,910</i>	<i>39,460</i>	<i>85,680</i>
Private Houses					50,000
Total for Devon	53,810	24,410	56,150	62,780	247,150

Table 4

Capacity of Tourist Accommodation by District (2007) Bed Spaces

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Total
East Devon	5,330	2,250	13,770	9,360	30,710
Exeter	2,530	90	0	0	2,620
Mid Devon	1,280	630	250	1,600	3,760
North Devon	8,220	4,460	10,980	18,790	42,450
Plymouth	5,170	340	0	950	6,460
South Hams	4,380	4,920	5,720	11,570	26,590
Teignbridge	3,350	1,600	7,850	11,770	24,570
Torrige	1,900	1,930	4,360	1,400	9,570
Torbay	18,460	7,220	12,300	5,160	43,140
West Devon	3,190	990	920	2,180	7,280
Devon	53,810	24,410	56,150	62,780	197,150

Table 5

Total Number of Tourist Nights spent in Devon per Year (1974 – 1996)

Year	Tourist nights	Annual change	
		Number	%
1974	29,383,000		
1975	31,812,500	+2,429,500	+8.3
1976	33,865,000	+2,052,500	+6.5
1977	34,210,000	+345,000	+1.0
1978	34,851,000	+641,000	+1.9
1979	34,073,500	-777,500	-2.2
1980	32,924,500	-1,149,000	-3.4
1981	30,443,000	-2,481,500	-7.5
1982	29,039,000	-1,404,000	-4.6
1983	30,774,000	+1,735,000	+6.0
1984	30,952,500	+178,500	+0.6
1985	31,953,800	+1,001,300	+3.2
1986	29,600,750	-2,353,050	-7.4
1987	30,343,700	+742,950	+2.5
1988	31,850,300	+1,506,600	+5.0
1989	32,207,650	+357,350	+1.1
1990	33,834,850	+1,627,200	+5.1
1991	32,124,500	-1,710,350	-5.1
1992	30,393,400	-1,731,100	-5.4
1993	31,212,700	+819,300	+2.7
1994	29,930,950	-1,281,750	-4.1
1995	31,487,750	+1,556,800	+5.2
1996	32,387,300	+899,550	+2.9

Figures calculated using the old methodology to illustrate historical trends.

Table 6

**Total Number of Tourist Nights spent
in Devon per Year (1996 - 2007)**

Year	Tourist nights	Annual change	
		Number	%
1996*	33,639,200		
1997	33,889,900	+250,700	+0.7
1998	32,607,400	-1,282,500	-3.8
1999	32,887,700	+280,300	+0.9
2000	32,101,300	-786,400	-2.4
2001	31,354,600	-746,700	-2.3
2002	33,149,000	+1,794,400	+5.7
2003	33,178,500	+29,500	+0.1
2004	32,912,400	-266,100	-0.8
2005	32,989,600	+77,200	+0.2
2006	33,059,400	+69,800	+0.2
2007	32,770,700	-289,000	-0.9

*Figures calculated using the new methodology.

Table 7

Tourist Nights by District
November 2006 - October 2007 (thousands)

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2006-2007	% of Devon
East Devon	874.2	407.1	1586.9	719.7	1,158.9	4,746.8	+0.4	14.5
Exeter	474.8	22.1	0.0	0.0	160.5	657.4	-5.0	2.0
Mid Devon	154.6	87.5	29.6	175.5	144.4	591.6	+9.2	1.8
North Devon	1,268.0	733.1	1,326.5	1,691.0	1,621.0	6,639.6	-3.0	20.3
Plymouth	755.5	73.1	0.0	110.6	303.4	1,242.6	+3.2	3.8
South Hams	615.3	740.5	792.8	1,031.6	1,027.2	4,207.4	-1.3	12.8
Teignbridge	472.8	195.8	1,172.2	928.6	894.5	3,663.9	-1.1	11.2
Torbay	2,891.7	947.4	1,743.5	401.7	1,932.9	7,917.2	-1.1	24.2
Torrige	245.9	413.3	659.1	109.4	461.1	1,888.8	+1.9	5.8
West Devon	450.0	154.0	144.4	170.3	296.7	1,215.4	-0.8	3.7
Total	8,202.8	3,773.9	7,455.0	5,338.4	8,000.6	32,770.7	-0.9	
% change from 2006	-2.0	+1.1	-1.9	+1.0	-0.9	-0.9		

Table 8

Tourist Nights by District
November 2005 - October 2006 (thousands)

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2005-2006	% of Devon
East Devon	885.0	426.8	1,610.8	650.1	1,154.0	4,726.7	-0.4	14.3
Exeter	500.7	22.4	0.0	0.0	169.0	692.1	0.0	2.1
Mid Devon	158.5	87.1	29.8	134.1	132.3	541.8	-0.5	1.6
North Devon	1,299.6	737.2	1,398.0	1,739.3	1,671.2	6,845.3	+1.5	20.7
Plymouth	755.2	73.1	0.0	81.8	294.0	1,204.1	+2.6	3.6
South Hams	624.4	734.1	822.7	1,040.7	1,040.7	4,262.6	+1.3	12.9
Teignbridge	471.8	191.7	1,189.9	947.3	904.6	3,705.3	+0.6	11.2
Torbay	2,962.6	924.0	1,746.8	415.6	1,953.8	8,002.8	-2.1	24.2
Torrige	244.4	385.6	660.7	110.9	452.7	1,854.3	-0.3	5.6
West Devon	471.0	150.6	139.5	164.6	299.0	1,224.7	+4.8	3.7
Total	8,373.2	3,732.6	7,598.2	5,284.4	8,071.3	33,059.7	+0.2	
% change from 2005	-2.7	+2.3	-0.9	+5.4	+0.2	+0.2		

Table 9

Tourist Nights by Month
November 2006 - October 2007 (thousands)

Month	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2006-2007	% of Year
November	472.6	147.4			200.3	820.3	-1.5	2.5
December	402.1	248.3			210.1	860.5	+4.5	2.6
January	328.4	81.7			132.5	542.6	-2.7	1.7
February	446.7	167.8			198.5	813.0	+6.9	2.5
March	547.6	129.4	199.1	92.7	312.9	1,281.7	+1.8	3.9
April	689.2	332.7	767.0	424.9	715.1	2,928.9	+1.1	8.9
May	762.1	337.7	976.1	553.4	849.3	3,478.6	+2.0	10.6
June	851.7	469.1	1,032.0	733.0	996.7	4,082.5	-1.0	12.5
July	987.0	460.9	1,146.0	1,042.5	1,174.6	4,811.0	-4.2	14.7
August	1,117.5	695.7	1,418.4	1,451.5	1,512.6	6,195.7	-1.5	18.9
September	900.6	366.6	1,074.8	642.2	963.9	3,948.1	-5.9	12.0
October	697.3	336.6	841.6	398.2	734.4	3,008.1	+4.3	9.2
Total	8,202.8	3,773.9	7,455.0	5,338.4	8,000.9	32,771.0	-0.9	
% change 2006-2007	-2.0	+1.1	-1.9	+1.0	-0.9	-0.9		

Table 10

Tourist Nights by Month
November 2005 - October 2006 (thousands)

Month	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2005-2006	% of Year
November	507.6	138.0	-	-	203.3	832.7	-4.3	2.6
December	458.9	268.6	-	-	201.1	823.7	-6.1	2.8
January	335.4	83.2	-	-	136.2	557.9	+1.4	1.7
February	447.8	163.6	-	-	185.7	760.7	-4.1	2.4
March	522.4	120.7	194.3	92.5	307.4	1,259.1	-20.1	3.7
April	689.7	342.8	814.1	389.7	707.1	2,896.3	+17.0	8.9
May	740.8	357.9	960.1	510.8	832.5	3,409.8	+0.2	10.3
June	864.4	450.3	1,038.9	754.2	1,006.6	4,123.0	0.0	12.4
July	1,027.9	457.6	1,120.8	1,106.5	1,226.7	5,024.5	+1.7	14.9
August	1,145.7	697.9	1,450.3	1,514.2	1,535.6	6,289.9	0.9	19.2
September	915.8	350.1	1,150.0	623.6	1,024.7	4,197.1	+0.2	12.3
October	716.8	302.0	869.5	292.9	704.3	2,884.8	-2.5	8.7
Total	8,373.2	3,732.7	7,598.0	5,284.4	8,071.2	33,059.5	+0.2	
% change 2005-2006	-2.7	+2.3	-0.8	+5.4	+0.2	+0.2		

Table 11

Distribution of Tourists by District
Peak of 2007 Season

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total
East Devon	4,600	2,200	12,100	8,100	8,700	35,700
Exeter	1,600	600	0	0	700	2,900
Mid Devon	600	600	300	1,200	900	3,600
North Devon	5,900	4,600	9,300	16,400	11,700	47,900
Plymouth	3,800	400	0	800	1,600	6,600
South Hams	3,100	4,100	5,700	10,700	7,600	31,200
Teignbridge	2,400	1,600	7,600	11,000	7,300	29,900
Torbay	15,600	6,100	10,100	8,300	13,000	53,100
Torridge	1,100	1,800	3,700	1,400	2,600	10,600
West Devon	2,600	800	800	2,600	2,200	9,000
TOTAL	41,300	22,800	49,600	60,500	56,300	230,500

Table 12

Distribution of Tourists by District
Peak of 2006 Season

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total
East Devon	4,700	2,100	12,300	7,100	8,500	34,700
Exeter	1,600	600	0	0	700	2,900
Mid Devon	600	500	300	1,200	800	3,400
North Devon	6,100	4,600	9,400	17,100	12,000	49,200
Plymouth	4,100	400	0	600	1,600	6,700
South Hams	3,000	4,300	6,400	12,300	8,400	34,400
Teignbridge	2,500	1,600	8,400	12,000	7,900	32,400
Torbay	15,900	6,200	10,300	9,000	13,400	54,800
Torridge	1,100	1,700	3,000	1,500	2,400	9,700
West Devon	2,600	800	600	2,500	2,100	8,600
TOTAL	42,200	22,800	50,700	63,300	57,800	236,800

Table 13

Tourist Spending in Devon November 2006 - October 2007

Accommodation	Annual tourist nights	Daily spending per night £	Total annual spending £m	Annual income to Devon £m
Serviced	8,202,800	59.10	484.80	240.95
Flats & houses	3,773,900	34.84	131.50	50.76
Holiday Park units	7,455,000	34.77	259.24	67.12
Touring pitches	5,338,400	21.70	115.87	24.33
Private Houses	8,000,600	30.68	245.46	69.61
TOTAL	32,770,700		1,236.87	452.77

Prices at June 2007 (Annual R.P.I. + 4.43% on 2006)

Table 14

Tourist Spending in Devon November 2005 - October 2006

Accommodation	Annual tourist nights	Daily spending per night £	Total annual spending £m	Annual income to Devon £m
Serviced	8,373,200	56.59	473.88	235.52
Flats & houses	3,732,600	33.37	124.54	48.07
Holiday Park units	7,598,000	33.30	253.01	65.50
Touring pitches	5,284,400	20.78	109.83	23.06
Private Houses	8,071,200	29.38	237.12	67.25
TOTAL	33,059,400		1,198.38	439.41

Prices at June 2006 (Annual R.P.I. + 3.28% on 2005)

Table 15

Serviced Accommodation Bed Space Availability (2006/2007)

District	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
East Devon	91	85	76	86	97	99	100	100	100	100	100	99
Exeter	100	99	100	100	100	100	100	100	100	100	100	100
Mid Devon	97	94	94	95	98	100	100	100	100	100	100	100
North Devon	83	79	65	76	92	99	99	100	100	100	100	98
Plymouth	99	99	99	99	99	100	100	100	100	100	100	100
South Hams	90	83	74	85	94	99	100	100	100	100	100	99
Teignbridge	93	87	89	91	94	99	100	100	100	100	100	98
Torbay	91	87	82	88	95	99	100	100	100	100	100	97
Torridge	92	88	86	86	98	98	99	100	100	100	100	99
West Devon	97	94	93	97	98	100	100	100	100	100	100	100
Devon Total	91	88	82	88	96	99	100	100	100	100	100	98

Table 16

Serviced Accommodation Bed Space Occupancy Rates by District and Month (2007) Based upon establishments open during that month

District	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
East Devon	38.2	30.2	21.9	36.5	36.3	45.6	50.9	58.3	64.8	70.4	63.8	50.6
Exeter	41.9	37.4	34.1	44.0	43.1	49.8	51.2	56.8	54.3	60.2	60.0	49.5
Mid Devon	21.7	21.8	17.0	24.3	27.5	38.6	40.8	39.6	40.1	43.9	40.9	33.1
North Devon	32.6	33.0	22.3	30.6	33.8	46.6	47.0	52.6	60.5	68.9	55.3	41.4
Plymouth	35.4	25.7	22.1	31.5	36.1	39.0	41.5	48.3	48.7	54.2	50.8	45.1
South Hams	30.0	31.2	18.5	28.6	30.2	40.4	43.8	52.0	55.1	67.6	54.4	40.2
Teignbridge	25.0	24.1	17.7	25.7	27.3	38.9	44.2	51.3	53.2	62.0	52.6	38.0
Torbay	35.2	31.1	26.2	36.4	33.5	39.7	43.5	51.5	59.0	68.1	54.2	40.7
Torridge	25.8	22.1	21.0	27.1	31.8	31.5	39.6	42.3	49.5	55.0	48.7	31.3
West Devon	28.6	26.8	26.7	30.8	31.2	47.4	46.3	50.3	53.9	59.3	51.4	42.2
Devon Total	33.3	29.8	23.8	33.2	33.5	41.8	44.8	51.5	56.8	64.7	54.5	41.9

Table 17

Serviced Accommodation Bed Space Occupancy Rates by District and Month (2006) Based upon establishments open during that month

District	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
East Devon	37.0	28.6	22.6	35.6	37.9	48.6	52.1	60.4	66.6	71.4	63.7	51.3
Exeter	50.9	43.1	36.9	47.3	42.2	50.3	52.1	58.2	58.1	64.2	60.2	50.1
Mid Devon	30.3	24.7	18.8	22.3	27.8	35.9	38.8	39.1	39.6	45.1	40.4	31.8
North Devon	32.0	34.1	23.2	31.0	30.0	47.3	42.0	52.3	62.7	71.4	58.4	42.8
Plymouth	34.7	27.7	26.2	33.7	33.1	39.0	44.8	48.0	52.5	61.0	53.5	45.5
South Hams	27.4	30.5	21.3	29.6	28.7	39.6	41.8	49.4	55.1	65.8	55.7	41.1
Teignbridge	29.5	23.3	18.9	25.7	26.8	37.3	42.7	52.4	55.8	64.4	51.2	38.4
Torbay	37.1	34.6	25.5	35.9	32.4	39.4	41.9	54.6	63.4	69.5	55.5	42.9
Torridge	25.1	25.8	15.0	26.4	27.3	34.5	42.4	42.7	48.8	57.0	50.4	34.0
West Devon	28.7	27.3	27.3	32.7	32.2	48.2	47.5	48.7	53.8	60.5	50.9	44.8
Devon Total	34.4	31.5	24.4	33.4	32.1	42.0	43.8	52.5	59.5	66.8	55.7	43.3

Table 18

Serviced Accommodation Occupancy by Size of Establishment

Based upon establishments open during that month (2007)

Number of Bed Spaces	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
1 - 6	13.6	11.6	9.5	14.4	14.3	27.2	29.8	34.0	41.4	47.2	37.7	22.8
7 - 20	19.4	17.3	14.7	19.8	22.2	33.7	37.0	45.7	52.3	62.2	46.7	29.5
21 - 50	32.0	22.6	20.2	26.8	27.5	33.6	38.8	47.6	52.5	63.7	50.0	36.3
51 - 100	41.6	41.5	29.3	41.8	41.7	49.2	54.2	60.2	63.8	65.7	62.3	52.7
101 +	46.1	42.7	34.1	48.1	48.8	55.8	56.2	60.9	65.6	73.3	65.9	56.6
Devon	33.3	29.8	23.8	33.2	33.5	41.8	44.8	51.5	56.8	64.7	54.5	41.9

Table 19

Serviced Accommodation Occupancy by Size of Establishment

Based upon establishments open during that month (2006)

Number of Bed Spaces	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
1 - 6	14.1	11.5	10.2	15.0	14.3	28.4	29.9	35.5	43.3	50.1	37.0	24.6
7 - 20	20.5	19.0	14.6	20.4	21.0	34.6	36.0	46.0	53.5	63.2	47.3	29.5
21 - 50	28.9	24.7	19.0	25.3	24.0	33.1	37.5	45.8	55.6	65.2	53.3	37.9
51 - 100	44.8	42.1	33.4	42.6	41.2	44.7	52.9	65.4	63.5	71.0	66.4	52.0
101 +	49.1	45.2	35.3	49.4	48.2	58.5	55.3	62.7	71.3	74.8	65.5	60.2
Devon	34.4	31.5	24.4	33.4	32.1	42.0	43.8	52.5	59.5	66.8	55.7	43.3

Table 20

County Occupancy Rates in Self Catering Accommodation

(2006 & 2007)

Season	Flats & houses		Holiday Park units		Touring pitches	
	2006	2007	2006	2007	2006	2007
Spring/Easter (March-April)	28.3	28.3	25.0	24.0	10.4	11.1
Early season (May-June)	58.5	58.4	58.0	58.4	30.6	31.1
Peak season (July-August)	66.8	66.6	67.2	67.3	60.3	57.4
Late season (September-October)	49.0	52.3	57.0	54.3	21.3	24.1

Table 21

Tourist Nights for Dartmoor and Exmoor National Parks

(based on years from November to October)

	Dartmoor		Exmoor (inc. Somerset part)	
	2006	2007	2006	2007
Serviced	231,600	223,300	343,600	339,600
Flats & houses	124,500	114,300	220,900	225,000
Holiday Park units	120,000	135,400	108,000	108,600
Touring pitches	255,600	242,600	341,700	320,700
Private houses	236,300	231,100	327,600	321,000
TOTAL	968,000	946,700	1,341,800	1,314,900

Table 22

Comments on the 2007 Season compared with 2006
Percentage of Serviced Accommodation in Devon expressing a particular view, based on 287 responses received.

	More %	Same %	Fewer %	None %
Total visitors	39	26	35	
Overseas visitors	23	33	37	7
Complete 1-week bookings	20	37	28	15
Complete 2-week bookings	8	22	24	46
Weekend breaks	34	42	20	4
Midweek breaks	27	41	24	8
One night stays	32	35	26	7
Late bookings	31	37	21	11
Arrivals without booking	16	30	29	25
Staff	6	32	8	54
Visitors from:				
Holland	11	27	27	36
Germany	21	28	30	22
France	10	21	27	42
Ireland	9	24	23	44
Scandinavia	16	16	17	51
North America	15	23	27	35
Australia	28	32	20	20
Japan	9	5	11	74
Other	17	19	23	40

Table 23

Major Trade Groups 2007 compared with 2006
Serviced Accommodation based upon 267 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	5	22	49	23	7
Families (with young children)	2	12	34	36	18
Families (with teenage children)	1	7	39	37	17
Middle-aged couples	24	40	42	18	0
Retirement age	22	35	45	20	0

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2006. The summary of replies is shown by percentage of businesses replying.

Table 24

Comments on the 2007 Season compared with 2006
 Percentage of Flats & Houses Accommodation (self catering) in
 Devon expressing a particular view, based on 278 responses.

	More %	Same %	Fewer %	None %
Total visitors	37	36	27	
Overseas visitors	16	29	21	34
Complete 1-week bookings	30	44	23	2
Complete 2-week bookings	16	48	25	10
Weekend breaks	24	31	19	27
Midweek breaks	15	30	17	38
One night stays	3	9	5	84
Late bookings	28	26	16	30
Arrivals without booking	2	11	5	82
Staff	5	31	1	63
Visitors from:				
Holland	13	20	10	58
Germany	10	22	9	59
France	8	13	8	71
Ireland	4	10	6	80
Scandinavia	4	8	5	83
North America	7	9	6	78
Australia	14	13	7	65
Japan	0	3	1	95
Other	10	15	7	68

Table 25

Major Trade Groups 2007 compared with 2006
 Flats & Houses Accommodation based upon 255 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	2	13	57	17	13
Families (with young children)	19	19	52	20	9
Families (with teenage children)	8	10	57	21	11
Middle-aged couples	17	27	57	12	5
Retirement age	12	22	61	13	4

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2006. The summary of replies is shown by percentage of businesses replying.

Table 26

Comments on the 2007 Season compared with 2006
Percentage of Holiday Parks (static units), in Devon expressing a particular view, based on 28 responses received.

	More %	Same %	Fewer %	None %
Total visitors	56	37	7	
Overseas visitors	41	30	19	11
Complete 1-week bookings	36	57	7	0
Complete 2-week bookings	22	52	22	4
Weekend breaks	52	41	7	0
Midweek breaks	46	42	12	0
One night stays	20	16	12	52
Late bookings	67	26	4	4
Arrivals without booking	12	38	23	27
Staff	15	73	4	8
Visitors from:				
Holland	22	39	13	26
Germany	30	30	17	22
France	14	50	9	27
Ireland	10	33	24	33
Scandinavia	5	35	15	45
North America	10	19	14	57
Australia	29	33	5	33
Japan	5	19	5	71
Other	0	33	13	53

Table 27

Major Trade Groups 2007 compared with 2006
Holiday Parks (static units) based upon 28 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	4	16	72	12	0
Families (with young children)	41	29	67	4	0
Families (with teenage children)	11	16	48	36	0
Middle-aged couples	15	31	58	12	0
Retirement age	15	35	54	12	0

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2006. The summary of replies is shown by percentage of businesses replying.

Table 28

Comments on the 2007 Season compared with 2006
Percentage of Touring Sites in Devon expressing a particular view,
based on 32 responses received.

	More %	Same %	Fewer %	None %
Total visitors	41	34	25	
Overseas visitors	29	42	19	10
Complete 1-week bookings	31	50	19	0
Complete 2-week bookings	25	53	19	3
Weekend breaks	45	45	10	0
Midweek breaks	27	50	17	7
One night stays	23	48	26	3
Late bookings	42	39	16	3
Arrivals without booking	16	56	25	3
Staff	13	71	6	10
Visitors from:				
Holland	34	38	14	14
Germany	17	45	21	17
France	10	48	17	24
Ireland	7	34	24	34
Scandinavia	4	32	18	46
North America	0	29	4	68
Australia	0	43	4	54
Japan	0	21	0	79
Other	8	33	8	50

Table 29

Major Trade Groups 2007 compared with 2006
Touring Sites based on 32 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	3	17	67	13	3
Families (with young children)	24	23	53	20	3
Families (with teenage children)	17	7	47	43	3
Middle-aged couples	24	24	62	14	0
Retirement age	10	27	63	10	0

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2006. The summary of replies is shown by percentage of businesses replying.

Table 30

Visitor Numbers to Attractions in Devon 2007

Attraction	Location	Visits 2005	Visits 2006	Visits 2007	Visits % 06/07 +/-	Adult Admission 2007 £
A la Ronde	Exmouth	27,216	23,708	28,564	+21	
Arlington Court (NT)	Arlington	67,326	75,725	80,483	+6	
Berry Pomeroy Castle	Berry Pomeroy	23,451	22,029	18,346	-17	
The Old Bakery & Forge	Branscombe	2,097	2,954	2,954	0	£2.60
Braunton & District Museum	Braunton	6,129	5,221	6,543	+25	F
Buckfast Butterfly Farm and Dartmoor Otter Sanctuary	Buckfast	50,000	40,000	45,000	+13	£6.50
Buckland Abbey	Buckland Monachorum	66,220	64,656	66,675	+3	
Castle Drogo	Drewsteignton	117,400	110,061	110,811	+1	
Chambercombe Manor	Ilfracombe	8,000	10,000	11,000	+10	£6.00
Coleton Fishacre House	Dartmouth	66,609	58,750	62,863	+7	
Compton Castle	Marldon	DK	16,712	15,847	-5	
Dartmouth Castle	Dartmouth	36,865	38,293	37,940	-1	
Dartmouth Museum	Dartmouth	7,047	9,123	9,600	+5	£1.50
Fairlynch Arts Centre & Museum	Budleigh Salterton	1,778	1,850	1,833	-1	£2.00
Finch Foundry	Sticklepath	18,659	19,568	19,211	-2	
Hartland Quay Museum	Hartland	4,103	4,387	4,810	+10	£1.00
Holsworthy Museum	Holsworthy	1,088	976	863	-12	£0.50
Ilfracombe Museum	Ilfracombe	18,721	18,310	18,764	+3	£2.00
Killerton House and Garden	Broadclyst	133,522	140,728	130,562	-7	
Knightshayes Court	Tiverton	86,832	DK	102,240	n/a	
Museum of Barnstaple and North Devon	Barnstaple	DK	53,710	50,148	-7	F
Northam Burrows Country Park	Northam	250,000	260,000	265,000	+2	£3.00
Okehampton Castle	Okehampton	9,584	9,321	9,436	+1	
Oldway Mansion	Paignton	1,000,000	1,000,000	1,000,000	0	F
Overbecks Museum	Sharpitor	33,689	34,628	33,831	-2	
Paignton Zoo	Paignton	448,329	463,546	507,727	+10	£10.30
Pecorama Pleasure Gardens and Exhibition	Beer	52,728	59,958	59,312	-1	£6.00
Powderham Castle	Powderham	100,500	100,500	100,500	0	£7.95
RHS Garden Rosemoor	Torrington	117,641	122,869	133,712	+9	£6.00
Saltram	Plympton	67,000	57,237	57,398	0	
Seaton Tramway	Seaton	114,065	108,622	97,179	-11	£7.95
Devon Guild of Craftsmen	Bovey Tracey	114,300	113,500	111,000	-2	F
The Donkey Sanctuary	Salcombe Regis	185,000	190,000	190,000	0	F
Totnes Castle	Totnes	22,634	23,624	21,239	-10	
Totnes Elizabethan House	Totnes	4,852	4,891	4,467	-9	£2.00
Totnes Guildhall	Totnes	1,380	2,211	3,693	+67	£1.00
Watermouth Castle	Ilfracombe	120,000	120,000	120,000	0	£10.50

Table 31

3. Definitions & Methodology

3.1 Definition

Serviced	Hotels, motels, guest houses, B&Bs, farmhouses and public houses offering accommodation.
Flats & Houses	Self-catering accommodation such as flats, houses, cottages not forming part of holiday parks.
Holiday Park Units	Static self-catering accommodation situated on holiday parks including mobile homes, static caravans, chalets, flats etc.
Touring	Touring caravans, motor caravans, tents and trailer-tents.

3.2 Methodology

Tourism Trends up to 1996 was carried out once per year and depended upon respondents having accurate records for the whole year. The old survey asked for the number of visitors/units occupied each Wednesday night during the year. This approach assumed that visitors stayed for complete weeks, and that Wednesday was representative for the whole week. Totals for each week were obtained by multiplying by the numbers of visitors on a Wednesday by seven.

The new Tourism Trends survey started in 1996 and is carried out on a continuous basis with forms being completed daily, weekly or monthly. All days are included for the Serviced sector so that weekend breaks are included. It also means that self-catering accommodation can be split so that both weekend and midweek breaks are included in calculations. The new method of collection is much more accurate for touring sites as many of these are full at weekends for much of the season but almost empty midweek out of the peak.

In the past the Serviced sector was analysed by District. The new survey employs a stratified technique, grouping establishments by number of bed spaces within each District, and applying the occupancy rate for the respondents in each group to the total capacity for that group to produce visitor night estimates.

In this edition all figures are reported on for the period from November 2006 to October 2007 and the corresponding period will be used for future reports. This has been done so that information about the main part of last season can be made available earlier than has been possible previously.



Exeter City Council



Photograph of Hot Air balloon over Devon by Bryony Snell and Ladrum Bay by Jenny Bowden