



Tourism Trends in Devon

2005



TOURISM TRENDS IN DEVON 2005

A report on the characteristics and trends of the tourism industry in Devon
from November 2004 to October 2005.

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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County of Devon

- Resorts
- ▭ Devon District Council Areas

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Figure 1

TOURISM TRENDS 2005

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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 of over £2.3 million for tourism marketing and development over the last three 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 increase of 77,200 tourist nights in Devon (+0.2%) for 2005 compared with the same period in 2004.
- 1.1.2 Significant increases in tourist nights for Devon were observed in March (+29.3%), coinciding with Easter, while significant decreases occurred in April (-15%).
- 1.1.3 There was an overall decrease in tourist nights (-1.5%) for Serviced Accommodation. Decreases were evident for most of the year, increases were noted for December, January and March.
- 1.1.4 There was an overall increase of tourist nights (+2.2%) for Flats & Houses. Compared to 2004 occupancy rates were higher for December, January, February, March, May, September and October.
- 1.1.5 There was an overall decrease (-0.8%) for Holiday Park units, the only significant increase observed was for March, most likely due to the Easter holidays.
- 1.1.6 There was an overall increase of 177,800 (+3.7%) for Touring Sites. Compared to 2004 occupancy rates were higher for most months, excluding April & May.
- 1.1.7 The overall estimate of spending in Devon by tourists staying overnight increased to £1,166.54 million, with an estimated £430.1 million remaining as income to Devon.
- 1.1.8 The capacity of tourist accommodation in 2005 dropped to around 199,630 bed spaces for all types, excluding any allowance for private households. Most of this was due to closures in Serviced Accommodation and Touring Pitches.
- 1.1.9 2005 showed an increase in Exmoor National Park of 39,200 tourist nights (+3.2%) and a decrease in visitors to Dartmoor National Park of 17,600 tourist nights (-1.8%).

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

1.2 Climate

- 1.2.1 Climate data was collected for Saunton (North Devon) and Torquay for March to October inclusive. The comments below refer to comparisons with the appropriate arithmetic mean for daily figures for the months and years between March to October, 2000-2005. Comments should be read in conjunction with Tables 5 and 6 and Figures 2 to 7.
- 1.2.2 Gaps in recorded climate data made direct comparison problematic to previous years; comparisons are between mean daily results from available data. In previous years data was presented for Exmouth (East Devon), however this station was closed in June 2005, so data was no longer available for this site.

- 1.2.3 Saunton and Torquay had on average less sunshine in 2005 than the previous five years. Both resorts had less daily rainfall than the previous five years. Compared to the mean daily maximum temperature for the previous five years, Saunton had a higher mean daily temperature, and Torquay the same mean temperature as the previous year.
- 1.2.4 As can be seen in Figures 3 and 6 the main significant rainfall was experienced at the end of the season in October for both Saunton and Torquay, as well as May for Torquay, and June for Saunton. Particularly low levels of rainfall were observed in Torquay during July, August and September.
- 1.2.5 Overall sunshine hours were slightly lower than previous years, though Torquay had higher mean recorded sunshine hours for August and October, and Saunton a higher mean for April, July and August.
- 1.2.6 Temperatures peaked for Saunton and Torquay in July, with the highest mean temperature for Saunton in July, and highest mean for Torquay in August. Overall the mean temperature for Saunton was higher than the previous five years, except for August and September. Torquay started the season with lower than average temperatures, and ended the season with higher than average temperatures, resulting in a mean equal to previous years.

1.3 Exchange Rates

- 1.3.1 Changes in base exchange rates between the Pound and other selected currencies are shown in Figures 8 to 11. 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 The exchange rate between the Pound and the Euro rose through the middle part of 2005 and returned to a similar level towards the end of 2005.
- 1.3.3 The Pound continued to strengthen against the U.S. Dollar in 2005, it dropped slightly against current levels later in the year.
- 1.3.4 The significant fall in the value of the Pound against the Japanese Yen, which occurred in 1999 and 2000, was reversed to some extent as the Pound strengthened again through 2001 to 2005. The exchange rate between the Yen/Pound fluctuated during 2005, the exchange rate finished the year higher than it began, with a peak at the end of the year; the trend was a strengthening of the Pound against the Yen.
- 1.3.5 During 2005 the value of the Pound rose against the Australian Dollar, peaking in June, decreasing in November before falling in December.

1.4 Comments from establishments about the 2005 season

Tables 26 to 33 contain comments made by proprietors comparing 2005 with 2004.

- 1.4.1 Apart from Holiday Parks, no increase in the numbers of overseas visitors from most countries to all types of accommodation was reported between 2004 and 2005.

Serviced accommodation and touring pitches reported a decrease in the number of visitors from overseas, while Flats & Houses appeared to remain about the same.

- 1.4.2 Increases for weekend bookings for most accommodation types, except Flats & Houses, were reported by a significant percentage of respondents. Holiday Parks reported the largest increase with 62% of sites, and 50% of Touring Sites saying they had had an increase in weekend bookings.
- 1.4.3 Holiday Parks and Serviced Accommodation had more reporting midweek breaks, while there was a slight decrease in the other two main types of accommodation.
- 1.4.4 Touring Sites and Holiday Parks reported an increase in 1-week stays; Serviced Accommodation reported fewer, and Flats and Houses similar.
- 1.4.5 Overall there was a reported decrease in bookings for 2 week breaks, except for Touring Sites.
- 1.4.6 As with last year, all types of accommodation reported increases in their number of late bookings.
- 1.4.7 Touring Sites & Holiday Parks reported 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 2005 compared with 2004.

- 1.4.8 In general Devon's tourism trade appears to be seeing an increase in trade in all sectors, with the exception of teenage families in Holiday Parks and Touring Sites.
- 1.4.9 Fewer bookings were taken for families with teenage children for Touring Sites and Holiday Parks.
- 1.4.10 In 2005 more accommodation providers reported increases in business from young couples. A quarter of serviced accommodation providers said that couples provided a major part of their business.
- 1.4.11 More bookings by families with young children were reported by all sectors.
- 1.4.12 Increased business was also widely reported for all accommodation categories from middle-aged couples and visitors of retirement age.

1.5 Summary

Visitor numbers increased slightly from 2004 to 2005, although there were variations within the different accommodation types, possibly reflecting changes in the type of visitor. Overall the mean for climate was similar to previous years, however, the recordings indicated slightly warmer and drier conditions than the mean with less sunshine hours. The Pound strengthened against the 1995 base rate for the Euro, US Dollar, Australian Dollar and the Yen, though there were fluctuations within the year that may have appeared more favourable at the time.

2. Tables & Graphs

A new methodology for the United Kingdom Tourism Survey was introduced in May 2005 so the data for 2005 in tables 1 to 3 should not be directly compared to previous years data.

Tourism in the UK

	2001	2002	2003	2004	2005	
Domestic UK Tourism						
Trips	163.1	167.3	151.0	126.6	138.65	millions
Nights	530	532	491	409	442	millions
Spending	26,094	26,700	26,482	24,357	22,667	£ millions
Purpose						
Holiday	62	61	60	60	65	% trips
Visiting friends/relatives	22	24	23	22	18	% trips
Business/conference	14	14	15	14	15	% trips
Other	2	2	2	4	2	% trips
Overseas Visitors to UK						
Trips	22.8	23.9	24.7	27.8	na	millions
Nights	190	199	203	227	na	millions
Spending	11,306	11,860	11,750	12,930	na	£ millions

Source: South West Tourism Research Department & United Kingdom Tourism Survey (UKTS) na=not available

Table 1

Tourism in the West Country

	2001	2002	2003	2004	2005	
Domestic UK Tourism						
Trips	19.8	21.0	18.2	20.5	21.1	millions
Nights	75.9	87.1	76.4	80.0	82.4	millions
Spending	3,291	3,901	3,472	4,103	3,801	£ millions
Purpose						
Holiday	72	72	74	70	74	% trips
Visiting friends/relatives	18	17	17	16	14	% trips
Business/conference	9	10	7	9	11	% trips
Other	1	1	2	5	1	% trips
Overseas Visitors to UK						
Trips	1.37	1.43	1.88	2.03	na	millions
Nights	11.7	11.5	16.2	16.7	na	millions
Spending	434	528	663	714	na	£ millions

Source: South West Tourism Research Department. na=not available

Table 2

Characteristics of UK Tourists Visiting the West Country

	2001 %	2002 %	2003 %	2004 %	2005 %
Age Group					
16-24	14	12	10	13	10
25-34	21	19	20	19	19
35-44	21	25	24	26	26
45-54	14	17	17	17	16
55-64	14	11	15	13	14
65+	16	15	15	12	15
Economic Grouping					
AB	30	34	33	35	30
C1	31	31	31	32	36
C2	21	19	18	16	19
DE	18	17	17	16	15
Mode of Transport					
Car	78	82	83	82	79
Train	9	6	6	7	7
Bus	5	3	3	4	3
Coach Tour	3	4	4	2	3
Plane	-	-	-	2	2
Other	4	3	4	3	6
Region of Origin					
London/South East	30	30	30	31	28
South West	25	27	25	26	29
West Midlands	11	10	13	11	11
Eastern	6	8	8	7	6
North West	7	6	7	7	6
East Midlands	6	7	5	6	6
Wales	6	6	5	5	6
Yorks/Humberside	5	4	5	3	5
Scotland	2	1	2	1	2
North East	2	1	1	2	1

Table 3

Summary of Weather Characteristics at Selected Resorts

March – October 2005

Resort	Mean sunshine hours	Mean maximum temperature		Days maximum temperature recorded over:		Mean daily rainfall		Days with no or little rain recorded (<0.1mm)
		°C	°F	18.5°C (65°F)	26.5°C (80°F)	mm	inches	
Saunton								
March	2.7	11.7	53	2	0	1.8	0.08	20
April	6.1	14.0	57	2	0	1.7	0.07	13
May	7.1	15.4	60	3	0	1.4	0.06	19
June	6.9	18.9	66	14	0	2.6	0.10	18
July	6.7	20.5	69	16	3	1.6	0.07	18
August	8.2	20.3	69	18	1	1.6	0.07	23
September	5.0	20.4	69	18	1	1.2	0.04	18
October	3.6	16.9	62	5	0	3.4	0.10	15
<i>Season</i>	<i>5.8</i>	<i>17.3</i>	<i>63</i>	<i>78</i>	<i>5</i>	<i>2.1</i>	<i>0.08</i>	<i>162</i>
Torquay								
March	4.3	10.7	51	0	0	1.5	0.06	20
April	6.0	13.1	56	0	0	2.8	0.11	10
May	8.3	16.1	61	5	0	1.1	0.05	22
June	9.1	20.0	68	18	0	1.9	0.08	17
July	8.5	21.9	71	25	2	0.4	0.02	18
August	9.0	22.3	72	24	0	0.1	0.00	26
September	5.9	20.5	69	17	0	0.6	0.02	25
October	4.8	16.9	62	2	0	3.7	0.10	17
<i>Season</i>	<i>7.0</i>	<i>17.7</i>	<i>64</i>	<i>91</i>	<i>2</i>	<i>1.5</i>	<i>0.06</i>	<i>155</i>

Table 4

Summary of Weather Characteristics at Selected Resorts

March – October 2004

Resort	Mean sunshine hours	Mean maximum temperature		Days maximum temperature recorded over:		Mean daily rainfall		Days with no or little rain recorded (<0.1mm)
		°C	°F	18.5°C (65°F)	26.5°C (80°F)	mm	inches	
Saunton								
March	4.6	11.2	52	0	0	1.3	0.05	14
April	5.5	13.6	56	2	0	1.6	0.06	14
May	9.0	17.2	63	8	0	0.3	0.01	27
June	7.5	18.6	66	12	1	1.9	0.07	17
July	5.2	18.6	66	15	1	1.6	0.06	17
August	6.8	21.4	70	24	4	4.3	0.17	14
September	5.6	19.1	66	12	1	1.9	0.08	15
October	4.1	15.1	59	2	2	4.9	0.19	13
<i>Season</i>	<i>6.0</i>	<i>16.9</i>	<i>62</i>	<i>75</i>	<i>9</i>	<i>2.2</i>	<i>0.09</i>	<i>131</i>
Torquay								
March	4.6	10.9	52	0	0	2.3	0.09	14
April	6.8	13.9	57	1	0	1.8	0.07	16
May	10.3	17.7	64	9	0	0.5	0.02	25
June	9.4	21.0	70	23	2	2.0	0.08	19
July	7.4	20.5	69	23	0	0.9	0.04	19
August	8.2	21.9	71	30	1	2.0	0.08	17
September	6.8	20.3	69	23	2	1.0	0.04	21
October	3.7	15.4	60	0	0	4.8	0.19	8
<i>Season</i>	<i>7.1</i>	<i>17.7</i>	<i>64</i>	<i>109</i>	<i>5</i>	<i>1.9</i>	<i>0.08</i>	<i>139</i>

Table 5

Summary of Weather Characteristics at Exmouth May - September

Year	Total recorded sunshine hours	Mean maximum temperature		Days 18.5°C (65°F)+	Days 26.5°C (80°F)+	Rainfall		Days with no rain
		°C	°F			mm	inches	
1990	1,152	19.1	66.4	78	3	179	7.0	108
1991	891	18.1	64.5	72	0	237	9.3	102
1992	918	18.6	65.4	81	0	268	10.5	83
1993	973	17.4	63.3	52	0	383	15.1	87
1994	921	17.6	63.7	67	0	321	12.6	88
1995	1,204	19.6	67.3	92	9	213	8.4	111
1996	1,101	16.6	61.8	55	0	204	8.1	86
1997	992	18.2	64.8	76	0	325	12.8	71
1998	961	18.7	65.6	78	0	272	10.8	65
1999	962	18.6	65.5	77	1	324	12.7	70
2000	780	18.2	64.7	63	0	249	9.8	64
2001	919	18.5	65.4	74	0	194	7.6	80
2002	868	18.1	64.5	63	0	241	9.5	74
2003	893	19.3	66.7	87	3	221	8.7	81
2004	na	18.2	64.6	82	7	na	na	99
2005	na	na	na	na	na	na	na	na

na= not available due to insufficient data, means are taken for 2004 from available data. Data for 2004 is indicative only.

Table 6

Temperature - Saunton 2005

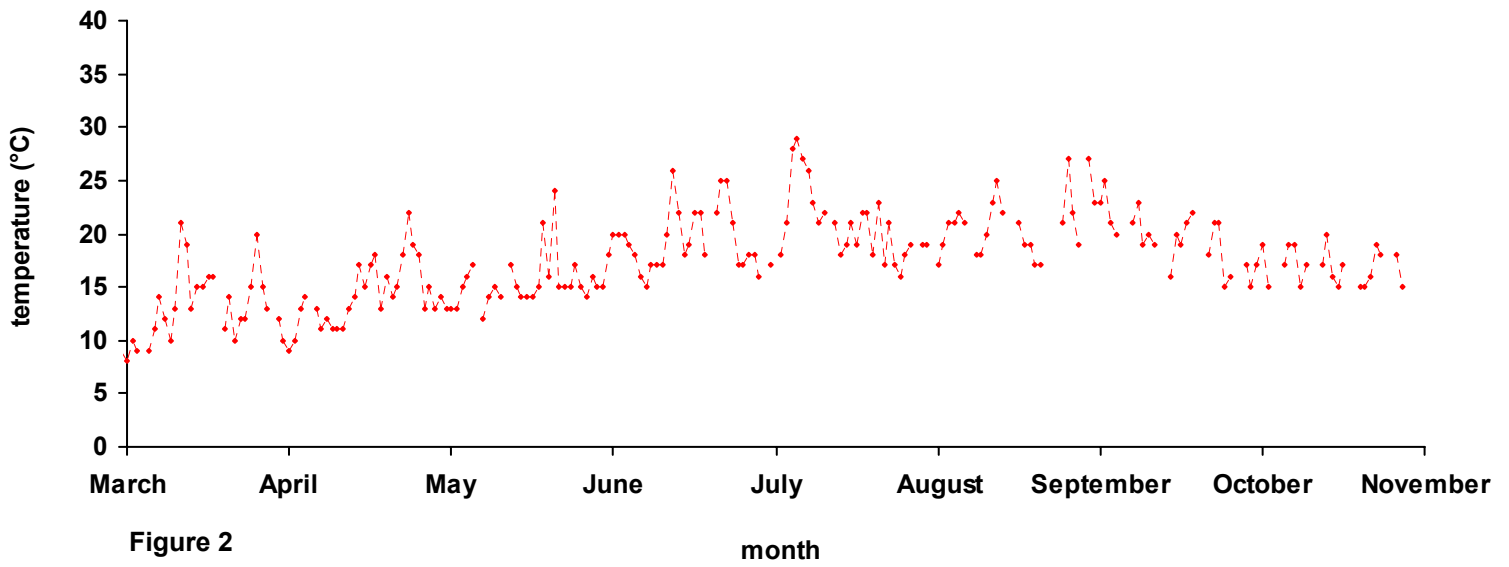


Figure 2

Rainfall- Saunton 2005

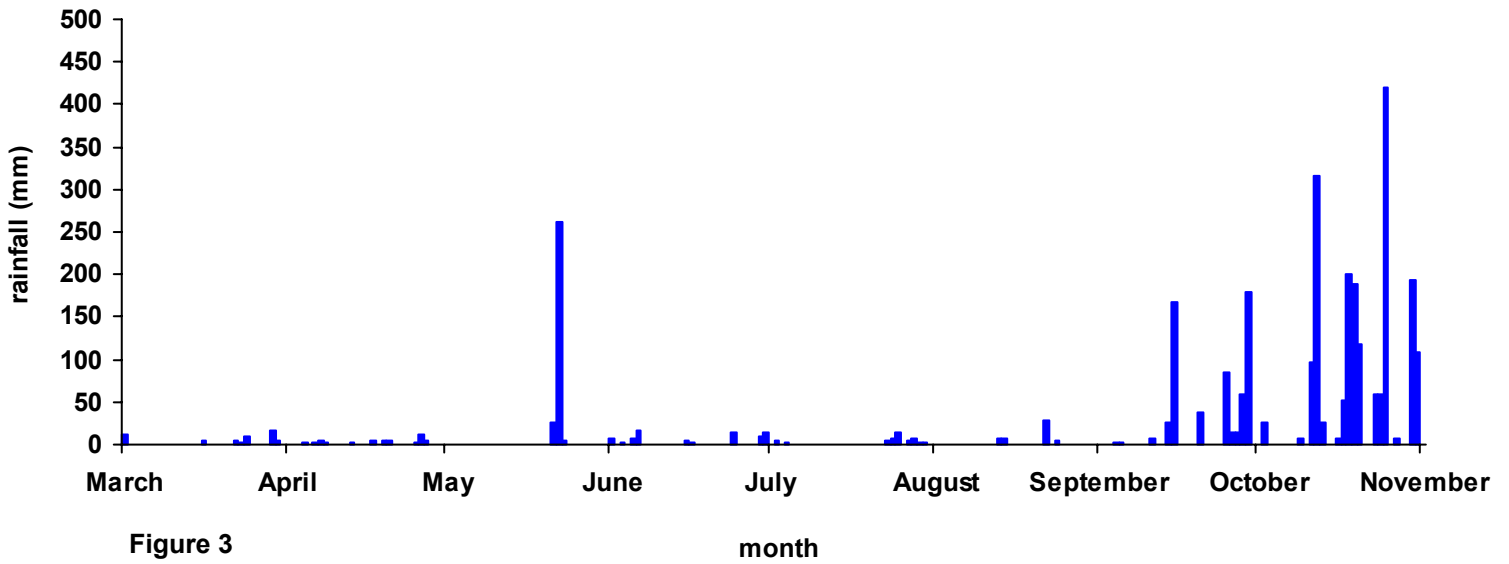


Figure 3

Sunshine - Saunton 2005

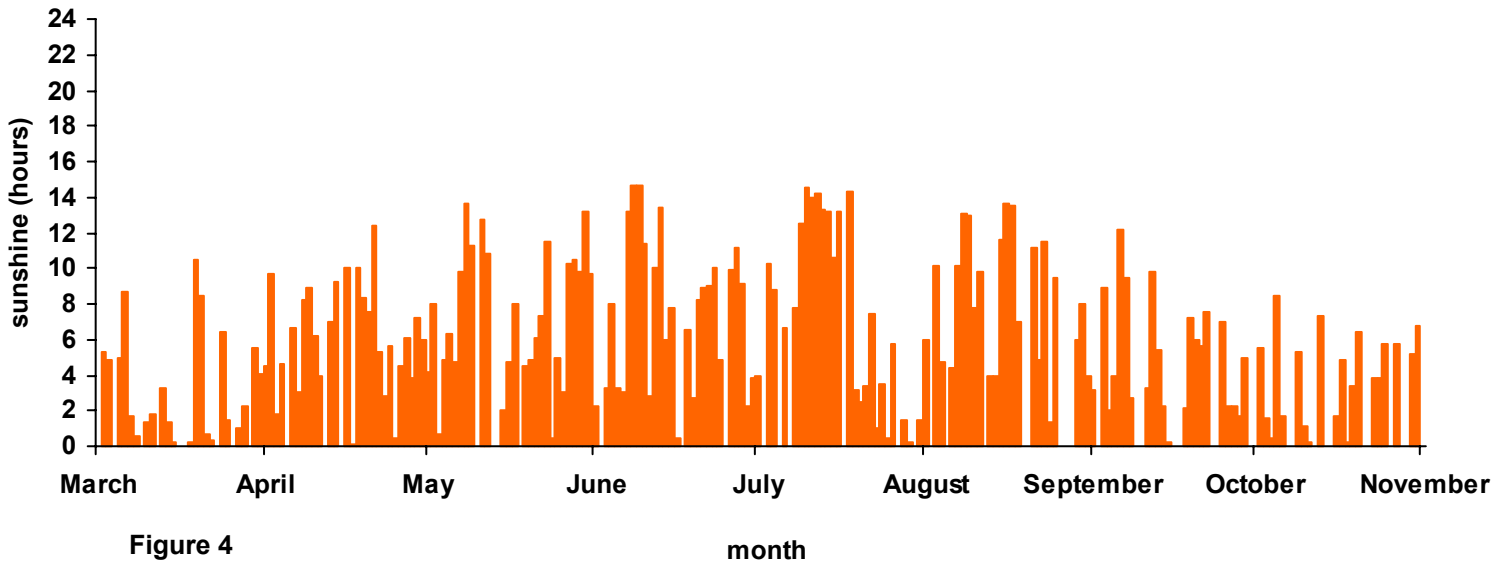


Figure 4

Temperature - Torquay 2005

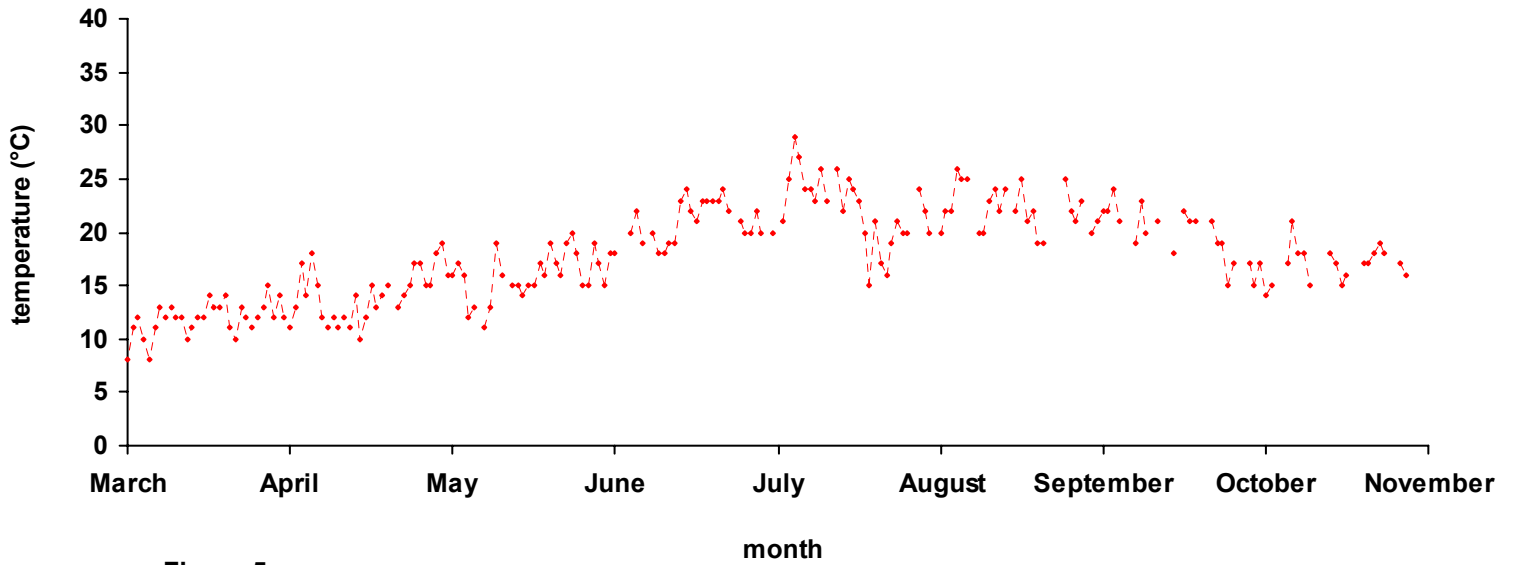


Figure 5

Rainfall - Torquay 2005

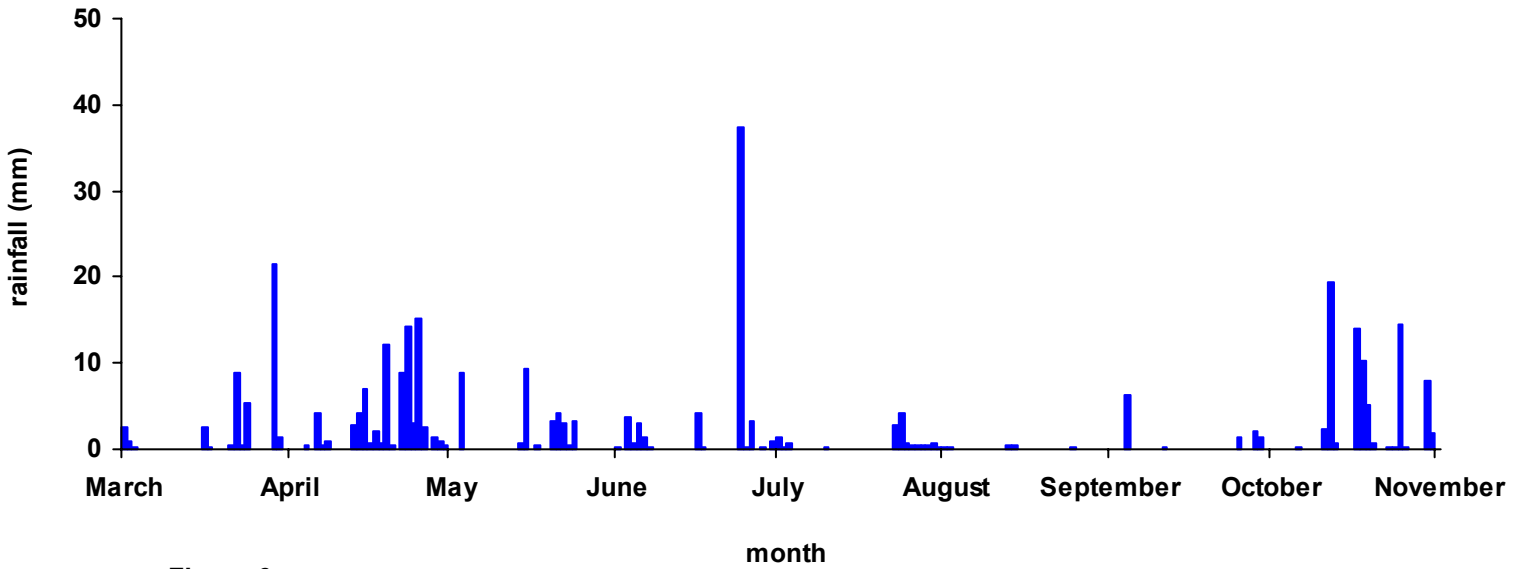


Figure 6

Sunshine - Torquay 2005

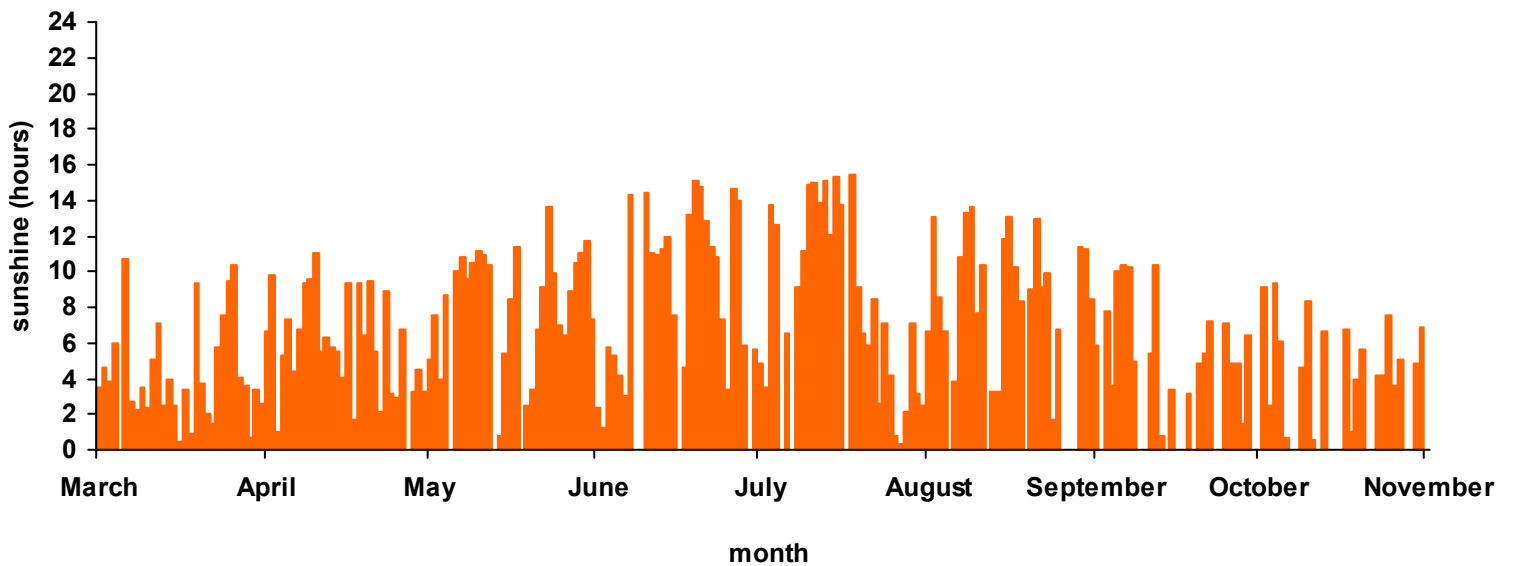


Figure 7

Exchange rates £ Sterling/US Dollar

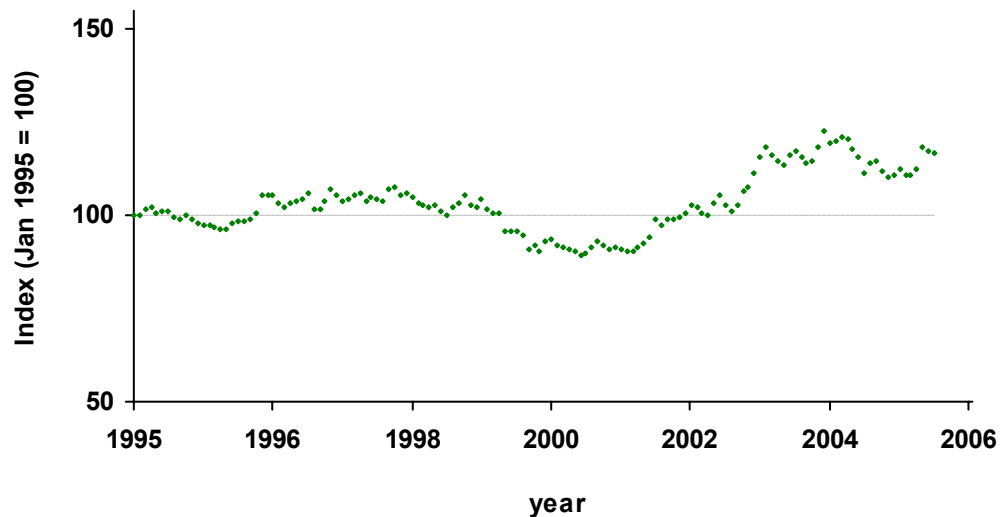


Figure 8

Exchange rates £ Sterling/European Euro

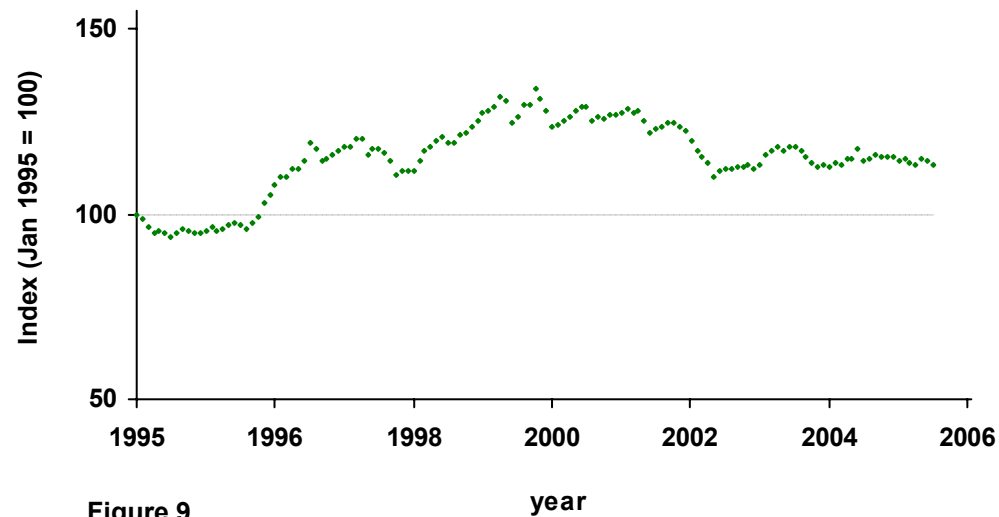


Figure 9

Exchange rates £ Sterling/Japanese Yen

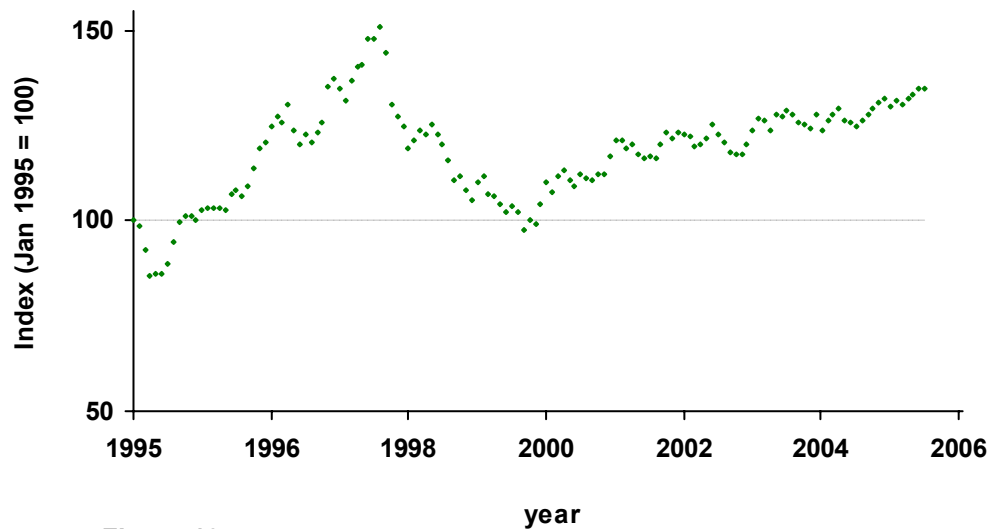


Figure 10

Exchange rates £ Sterling/Australian Dollar

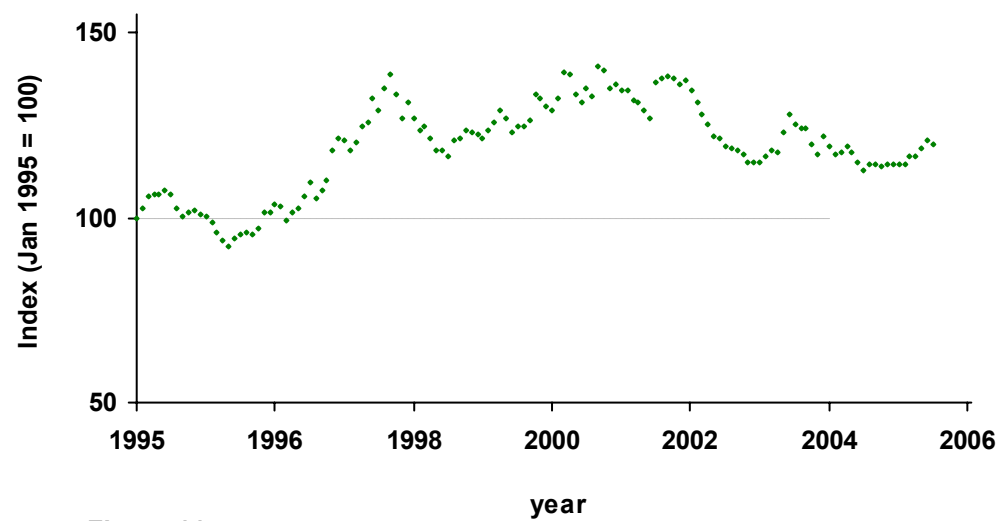


Figure 11

Capacity of Tourist Accommodation in Resorts/Tourist Centres (2005) Bed Spaces

	Serviced	Flats & houses	Holiday Park units	Touring pitches	Total
Resorts					
East Devon					
Exmouth	1,280	460	7,470	910	10,120
Seaton	280	40	970	1,000	2,290
Sidmouth	1,620	280	300	660	2,860
North Devon					
Combe Martin	270	190	570	0	1,030
Ifracombe	3,400	520	2,260	1,530	7,710
Lynton/Lynmouth	1,150	260	250	750	2,410
Woolacombe	1,220	800	4,380	5,520	11,920
South Hams					
Dartmouth	560	590	1,080	0	2,230
Salcombe	510	290	260	0	1,060
Teignbridge					
Dawlish	420	280	5,590	4,970	11,260
Teignmouth/Shaldon	860	550	1,080	100	2,590
Torbay					
Brixham	570	520	4,630	1,020	6,740
Paignton	5,170	3,040	5,720	4,850	18,780
Torquay	13,920	3,490	1,790	0	19,200
Torridge					
Westward Ho!	470	300	1,940	310	3,020
Tourist centres					
Barnstaple	750	70	0	0	820
Exeter	2,580	90	0	0	2,670
Plymouth	4,810	330	0	950	6,090
<i>Total in resorts</i>	<i>39,840</i>	<i>12,100</i>	<i>38,290</i>	<i>22,570</i>	<i>112,800</i>
Outside resorts					
East Devon	2,690	1,530	4,960	6,560	15,740
Mid Devon	1,410	600	250	1,410	3,670
North Devon	2,300	2,530	3,600	9,800	18,230
South Hams	3,450	4,130	4,830	11,330	23,740
Teignbridge	2,280	810	1,280	7,410	11,780
Torridge	1,610	1,550	2,470	1,120	6,750
West Devon	3,150	930	870	1,970	6,920
<i>Total outside resorts</i>	<i>16,890</i>	<i>12,080</i>	<i>18,260</i>	<i>39,600</i>	<i>86,830</i>
Private Houses					
					50,000
Total for Devon	56,730	24,180	56,550	62,170	249,630

Table 7

Capacity of Tourist Accommodation by District (2005) Bed Spaces

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Total
East Devon	5,870	2,310	13,700	9,130	31,010
Exeter	2,580	90	0	0	2,670
Mid Devon	1,410	600	250	1,410	3,670
North Devon	9,090	4,370	11,060	17,600	42,120
Plymouth	4,810	330	0	950	6,090
South Hams	4,520	5,010	6,170	11,330	27,030
Teignbridge	3,560	1,640	7,950	12,480	25,630
Torrige	2,080	1,850	4,410	1,430	9,770
Torbay	19,660	7,050	12,140	5,870	44,720
West Devon	3,150	930	870	1,970	6,920
Devon	56,730	24,180	56,550	62,170	199,630

Table 8

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 9

**Total Number of Tourist Nights spent
in Devon per Year (1996 - 2005)**

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

*Figures calculated using the new methodology.

Table 10

Tourist Nights by District
November 2004 - October 2005 (thousands)

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2004-2005	% of Devon
East Devon	921.5	408.6	1,622.6	635.4	1,159.0	4,747.1	+2.6	14.4
Exeter	500.9	22.1	0.0	0.0	168.9	691.9	-2.2	2.1
Mid Devon	174.1	81.2	30.6	125.7	132.9	544.5	+0.5	1.7
North Devon	1,314.1	732.6	1,438.7	1,612.2	1,646.5	6,744.1	+3.2	20.4
Plymouth	732.7	71.1	0.0	82.9	286.4	1,173.1	-2.7	3.6
South Hams	644.5	727.5	798.5	1,008.6	1,026.8	4,205.9	-2.6	12.7
Teignbridge	496.0	206.2	1,179.5	901.8	899.1	3,682.6	+3.3	11.2
Torbay	3,081.3	879.9	1,802.3	412.6	1,994.9	8,171.0	-3.3	24.8
Torridge	265.0	374.0	668.7	98.8	454.3	1,860.8	+3.7	5.6
West Devon	477.4	144.5	123.6	137.8	285.3	1,168.6	-0.3	3.5
Total	8,607.5	3,647.7	7,664.5	5,015.8	8,054.1	32,989.6	+0.2	
% change from 2004	-1.5	+2.2	-0.8	+3.7	+0.2	+0.2		

Table 11

Tourist Nights by District
November 2003 - October 2004 (thousands)

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2003-2004	% of Devon
East Devon	870.8	394.5	1,644.4	588.6	1,130.0	4,628.3	-3.8	14.1
Exeter	513.8	21.0	0.0	0.0	172.7	707.5	-5.1	2.1
Mid Devon	167.4	76.8	33.5	132.3	132.0	542.0	-1.9	1.6
North Devon	1,356.4	711.1	1,426.6	1,446.2	1,596.0	6,536.3	0.0	19.9
Plymouth	762.3	68.6	0.0	80.2	294.3	1,205.4	+3.2	3.7
South Hams	665.3	712.5	860.9	1,023.4	1,054.0	4,316.1	+0.8	13.1
Teignbridge	512.3	190.1	1,087.9	903.4	870.0	3,563.7	-5.0	10.8
Torbay	3,144.2	902.1	1,910.9	426.9	2,062.0	8,446.1	-0.3	25.7
Torridge	265.8	345.2	649.6	96.3	438.0	1,794.9	+2.9	5.5
West Devon	481.7	147.3	116.4	140.7	286.0	1,172.1	+5.0	3.6
Total	8,740.0	3,569.2	7,730.2	4,838.0	8,035.0	32,912.4	-0.8	
% change from 2003	-2.7	+1.8	-3.7	+5.9	-0.8	-0.8		

Table 12

Tourist Nights by Month
November 2004 - October 2005 (thousands)

Month	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2004-2005	% of Year
November	531.0	139.5			216.6	887.1	+1.7	2.7
December	477.9	269.6			241.4	988.9	+1.2	3.0
January	342.9	70.5			133.5	546.9	-4.2	1.7
February	456.8	171.2			202.8	830.8	+4.6	2.5
March	584.5	162.5	277.7	146.3	378.3	1,549.4	+29.3	4.7
April	673.4	282.4	687.6	258.9	614.4	2,516.7	-15.0	7.6
May	773.4	345.2	973.1	473.8	828.7	3,394.2	-3.5	10.3
June	874.7	435.3	1,071.9	728.6	1,004.7	4,115.2	+0.7	12.5
July	1,052.8	436.4	1,142.5	1,038.1	1,185.3	4,855.1	-1.7	14.7
August	1,173.1	670.7	1,408.9	1,499.6	1,535.0	6,287.3	+1.4	19.1
September	920.3	344.7	1,192.0	609.7	990.7	4,057.9	+1.1	12.3
October	746.2	319.7	910.7	260.8	722.7	2,960.2	+6.4	9.0
Total	8607.5	3,647.7	7,664.5	5,015.8	8,054.1	32,989.6	+0.2	
% change 2004-2005	-1.5	+2.2	-0.8	+3.7	+0.2	+0.2		

Table 13

Tourist Nights by Month
November 2003 - October 2004 (thousands)

Month	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total	% change 2003-2004	% of Year
November	533.5	125.9	-	-	213.0	872.4	+1.5	2.7
December	499.6	239.0	-	-	238.6	977.2	+10.7	3.0
January	366.9	64.8	-	-	139.4	571.1	+6.4	1.7
February	442.6	157.7	-	-	193.9	794.2	-0.6	2.4
March	548.3	127.1	177.9	52.4	292.5	1,198.1	-5.8	3.6
April	730.4	342.2	853.4	310.9	722.5	2,959.4	+1.6	9.0
May	791.8	315.6	969.1	582.7	858.9	3,518.1	-2.2	10.7
June	896.2	437.2	1,043.3	712.6	997.8	4,087.1	+2.6	12.4
July	1,091.9	456.8	1,149.2	1,036.7	1,206.1	4,940.7	-0.4	15.0
August	1,198.5	658.7	1,444.5	1,384.3	1,513.4	6,199.4	-5.7	18.8
September	900.2	327.1	1,231.6	574.3	979.7	4,012.9	-0.5	12.2
October	740.1	317.3	861.3	184.1	679.2	2,782.0	+0.3	8.5
Total	8,740.0	3,569.2	7,730.2	4,838.0	8,035.0	32,912.4	-0.8	
% change 2003-2004	-2.7	+1.8	-3.7	+5.9	-0.8	-0.8		

Table 14

Distribution of Tourists by District
Peak of 2005 Season

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total
East Devon	4,800	2,000	12,100	7,300	8,500	34,700
Exeter	1,600	600	0	0	700	2,900
Mid Devon	700	500	200	1,300	900	3,600
North Devon	6,200	4,500	8,500	16,300	11,500	47,000
Plymouth	3,600	400	0	700	1,500	6,200
South Hams	3,300	4,300	6,200	11,900	8,300	34,000
Teignbridge	2,500	1,600	8,300	12,600	8,100	33,100
Torbay	16,500	6,100	9,900	9,300	13,500	55,300
Torrige	1,100	1,700	3,000	1,300	2,300	9,400
West Devon	2,600	800	600	2,300	2,000	8,300
TOTAL	42,900	22,500	48,800	63,000	57,300	234,500

Table 15

Distribution of Tourists by District
Peak of 2004 Season

District	Serviced	Flats & houses	Holiday Park units	Touring pitches	Private household	Total
East Devon	4,700	2,100	12,400	7,100	8,500	34,800
Exeter	1,700	600	0	0	700	3,000
Mid Devon	600	500	300	1,300	900	3,600
North Devon	6,300	4,400	10,200	14,800	11,500	47,200
Plymouth	4,400	400	0	650	1,800	7,250
South Hams	3,200	4,300	6,200	11,800	8,200	33,700
Teignbridge	2,700	1,400	7,900	9,800	7,000	28,800
Torbay	16,700	6,200	10,300	8,700	13,500	55,400
Torrige	1,100	1,600	3,200	1,100	2,300	9,300
West Devon	2,700	900	700	1,900	2,000	8,200
TOTAL	44,100	22,400	51,200	57,150	56,400	231,250

Table 16

Tourist Spending in Devon November 2004 - October 2005

Accommodation	Annual tourist nights	Daily spending per night £	Total annual spending £m	Annual income to Devon £m
Serviced	8,607,500	54.80	471.67	234.42
Flats & houses	3,644,500	32.31	117.74	45.45
Holiday Park units	7,664,500	32.24	247.11	63.98
Touring pitches	5,015,800	20.12	100.94	21.20
Private Houses	8,053,100	28.45	229.08	64.97
TOTAL	32,985,400		1,166.54	430.01

Prices at June 2005 (Annual R.P.I. + 2.89% on 2004)

Table 17

Tourist Spending in Devon November 2003 - October 2004

Accommodation	Annual tourist nights	Daily spending per night £	Total annual spending £m	Annual income to Devon £m
Serviced	8,740,000	53.26	465.48	231.34
Flats & houses	3,569,200	31.40	112.07	43.26
Holiday Park units	7,730,200	31.34	242.23	62.71
Touring pitches	4,838,000	19.56	94.62	19.87
Private Houses	8,035,000	27.65	222.14	63.00
TOTAL	32,912,400		1,136.55	420.19

Prices at June 2004 (Annual R.P.I. + 3.03% on 2003)

Table 18

Serviced Accommodation Bed Space Availability (2004/2005)

District	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
East Devon	89	83	73	82	96	99	100	100	100	100	100	99
Exeter	100	99	100	99	100	100	100	100	100	100	100	100
Mid Devon	96	93	93	93	98	100	100	100	100	100	100	100
North Devon	82	78	66	75	92	99	99	100	100	100	100	98
Plymouth	99	99	99	99	99	100	100	100	100	100	100	100
South Hams	87	81	74	82	93	99	100	100	100	100	100	99
Teignbridge	93	88	87	90	95	100	100	100	100	100	100	98
Torbay	91	87	83	87	95	99	100	100	100	100	100	97
Torridge	92	89	86	86	98	99	100	100	100	100	100	99
West Devon	96	91	91	96	98	98	99	100	100	100	100	100
Devon Total	91	87	82	87	96	99	100	100	100	100	100	98

Table 19

Serviced Accommodation Bed Space Occupancy Rates by District and Month (2005) Based upon establishments open during that month

District	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
East Devon	33.0	27.6	20.2	35.0	40.3	45.1	50.5	57.6	63.0	67.1	62.3	51.1
Exeter	46.8	39.5	32.7	44.2	44.7	49.7	57.4	60.8	63.0	66.0	58.0	51.2
Mid Devon	25.3	22.4	17.2	29.8	29.6	36.7	38.3	41.0	50.9	50.9	38.6	33.2
North Devon	31.9	29.7	22.5	31.1	30.0	38.2	42.5	51.5	61.6	68.7	55.4	44.6
Plymouth	36.9	33.8	24.5	33.4	36.1	45.5	46.5	49.1	58.8	57.6	52.6	42.0
South Hams	25.9	25.8	17.7	28.3	31.8	39.8	43.7	51.6	56.7	70.9	52.6	38.9
Teignbridge	26.9	24.6	22.4	28.9	32.3	35.4	40.8	48.7	54.0	62.6	52.0	41.1
Torbay	39.4	36.7	26.9	35.3	35.7	37.2	43.0	52.4	61.5	70.2	54.6	42.9
Torridge	30.1	26.4	21.9	31.3	31.7	33.4	37.1	40.6	43.2	55.0	45.9	38.8
West Devon	33.5	28.7	27.6	35.0	35.6	45.1	46.6	48.8	54.3	60.2	51.0	44.6
Devon Total	34.9	31.9	24.4	33.7	34.9	39.7	44.4	51.6	59.3	66.4	54.3	43.6

Table 20

Serviced Accommodation Bed Space Occupancy Rates by District and Month (2004) Based upon establishments open during that month

District	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
East Devon	31.7	27.4	24.7	36.6	34.3	44.9	44.4	53.4	59.9	65.0	54.0	45.8
Exeter	46.0	39.6	28.4	46.3	42.8	48.7	52.5	59.2	61.5	63.7	55.7	52.9
Mid Devon	24.0	23.9	20.7	30.5	25.1	35.8	35.5	37.5	47.2	42.6	35.9	33.3
North Devon	29.9	28.8	22.2	31.6	30.3	42.0	44.8	51.5	61.8	69.0	54.5	44.2
Plymouth	34.1	31.9	27.2	29.8	35.4	43.1	48.7	53.1	64.4	69.5	49.9	42.0
South Hams	25.8	26.6	22.0	31.7	31.1	43.7	43.0	53.2	58.2	66.3	52.5	38.9
Teignbridge	27.2	30.6	19.6	25.8	27.5	38.9	40.5	50.5	57.3	64.2	48.6	38.8
Torbay	37.6	36.6	29.0	30.8	32.5	41.5	44.8	53.1	62.7	69.8	53.4	41.6
Torridge	28.5	26.1	19.6	31.6	29.5	36.9	38.7	42.0	46.5	53.2	41.8	37.8
West Devon	31.7	29.0	28.8	37.8	34.3	51.8	48.4	48.6	56.2	63.7	51.0	45.8
Devon Total	33.3	32.0	26.0	32.3	32.4	42.6	44.7	51.9	60.3	66.7	52.1	42.5

Table 21

Serviced Accommodation Occupancy by Size of Establishment

Based upon establishments open during that month (2005)

Number of Bed Spaces	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
1 - 6	12.7	10.6	10.6	16.8	19.6	23.0	29.5	42.9	41.3	48.4	34.3	22.1
7 - 20	18.6	17.4	14.9	20.1	24.4	30.2	35.8	44.6	52.2	63.4	44.7	30.1
21 - 50	31.7	30.4	20.5	23.1	27.9	34.3	39.8	47.4	56.7	65.6	52.0	38.7
51 - 100	46.2	43.6	29.0	43.5	44.4	46.5	55.7	62.6	63.2	69.0	62.6	50.0
101 +	50.8	43.5	36.3	52.1	49.1	54.8	54.9	62.2	72.4	75.2	67.3	62.8
Devon	34.9	31.9	24.4	33.7	34.9	39.7	44.4	51.6	59.3	66.4	54.3	43.6

Table 22

Serviced Accommodation Occupancy by Size of Establishment

Based upon establishments open during that month (2004)

Number of Bed Spaces	% Nov	% Dec	% Jan	% Feb	% Mar	% Apr	% May	% Jun	% Jul	% Aug	% Sep	% Oct
1 - 6	13.9	11.0	9.3	14.7	15.8	26.5	27.7	32.5	41.5	48.4	32.7	22.3
7 - 20	20.6	19.9	16.1	22.4	19.5	32.9	34.1	45.0	54.2	62.5	41.5	27.6
21 - 50	27.5	29.6	21.9	25.9	26.9	37.0	42.9	49.9	57.5	66.3	49.5	38.1
51 - 100	44.5	42.5	29.9	37.3	39.1	49.1	56.2	61.5	66.1	69.0	63.4	49.2
101 +	49.3	44.1	40.2	48.0	50.0	58.2	55.9	62.4	73.2	77.2	65.0	62.6
Devon	33.5	32.0	26.0	32.3	32.5	42.6	44.9	52.1	60.6	66.9	52.2	42.6

Table 23

County Occupancy Rates in Self Catering Accommodation

(2004 & 2005)

Season	Flats & houses		Holiday Park units		Touring pitches	
	2004	2005	2004	2005	2004	2005
Spring/Easter (March-April)	30.3	28.7	27.4	25.7	7.8	8.7
Early season (May-June)	53.4	55.4	56.9	57.8	31.3	29.1
Peak season (July-August)	62.7	62.3	71.3	70.2	55.7	58.4
Late season (September-October)	40.3	41.5	59.2	59.5	17.6	20.2

Table 24

Tourist Nights for Dartmoor and Exmoor National Parks

(based on years from November to October)

	Dartmoor		Exmoor (inc. Somerset part)	
	2004	2005	2004	2005
Serviced	258,300	247,800	332,300	344,500
Flats & houses	121,500	119,400	206,900	211,700
Holiday Park units	114,800	121,900	109,000	109,900
Touring pitches	258,100	250,300	298,600	310,300
Private houses	243,100	238,800	305,800	315,400
TOTAL	995,800	978,200	1,252,600	1,291,800

Table 25

Comments on the 2005 Season compared with 2004
Percentage of Serviced Accommodation in Devon expressing a particular view, based on 303 responses received.

	More %	Same %	Fewer %	None %
Total visitors	42	30	29	
Overseas visitors	23	33	36	8
Complete 1-week bookings	19	42	26	13
Complete 2-week bookings	11	25	22	42
Weekend breaks	33	45	17	5
Midweek breaks	30	41	21	9
One night stays	36	35	24	5
Late bookings	42	36	13	10
Arrivals without booking	20	30	31	19
Staff	8	37	9	46
Visitors from:				
Holland	12	21	22	45
Germany	21	28	26	26
France	10	23	22	46
Ireland	10	22	20	48
Scandinavia	13	20	19	49
North America	11	27	28	33
Australia	23	32	23	22
Japan	5	8	14	73
Other	16	22	21	42

Table 26

Major Trade Groups 2005 compared with 2004
Serviced Accommodation based upon 256 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	6	24	50	18	8
Families (with young children)	3	10	43	33	14
Families (with teenage children)	2	9	38	39	13
Middle-aged couples	22	41	45	13	1
Retirement age	18	35	48	16	1

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2004. The summary of replies is shown by percentage of businesses replying.

Table 27

Comments on the 2005 Season compared with 2004
 Percentage of Flats & Houses Accommodation (self catering) in
 Devon expressing a particular view, based on 279 responses.

	More %	Same %	Fewer %	None %
Total visitors	28	40	32	
Overseas visitors	16	26	16	42
Complete 1-week bookings	25	49	25	1
Complete 2-week bookings	19	44	31	6
Weekend breaks	16	31	21	32
Midweek breaks	11	24	17	49
One night stays	3	4	1	92
Late bookings	33	26	11	30
Arrivals without booking	5	4	7	85
Staff	5	25	4	65
Visitors from:				
Holland	10	15	13	63
Germany	18	23	10	49
France	5	14	7	74
Ireland	6	15	5	75
Scandinavia	8	4	8	80
North America	10	9	10	72
Australia	10	13	5	72
Japan	1	2	2	96
Other	12	15	6	68

Table 28

Major Trade Groups 2005 compared with 2004
 Flats & Houses Accommodation based upon 219 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	3	11	47	25	17
Families (with young children)	14	14	62	18	7
Families (with teenage children)	4	5	59	24	11
Middle-aged couples	16	23	55	15	7
Retirement age	14	21	59	13	7

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2004. The summary of replies is shown by percentage of businesses replying.

Table 29

Comments on the 2005 Season compared with 2004
Percentage of Holiday Parks (static units), in Devon expressing a particular view, based on 35 responses received.

	More %	Same %	Fewer %	None %
Total visitors	50	22	28	
Overseas visitors	30	52	9	9
Complete 1-week bookings	47	26	26	0
Complete 2-week bookings	21	29	47	3
Weekend breaks	62	24	9	6
Midweek breaks	47	44	6	3
One night stays	7	23	20	50
Late bookings	35	44	15	6
Arrivals without booking	28	38	19	16
Staff	21	53	12	15
Visitors from:				
Holland	27	50	4	19
Germany	13	43	9	35
France	4	43	17	35
Ireland	5	36	9	50
Scandinavia	5	18	9	68
North America	5	14	9	73
Australia	9	32	9	50
Japan	0	9	9	82
Other	6	22	6	67

Table 30

Major Trade Groups 2005 compared with 2004
Holiday Parks (static units) based upon 35 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	3	24	52	24	0
Families (with young children)	40	22	70	7	0
Families (with teenage children)	9	7	53	40	0
Middle-aged couples	29	44	48	7	0
Retirement age	23	39	54	7	0

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2004. The summary of replies is shown by percentage of businesses replying.

Table 31

Comments on the 2005 Season compared with 2004
Percentage of Touring Sites in Devon expressing a particular view,
based on 35 responses received.

	More %	Same %	Fewer %	None %
Total visitors	65	23	13	
Overseas visitors	3	61	32	3
Complete 1-week bookings	41	50	9	0
Complete 2-week bookings	35	45	19	0
Weekend breaks	50	31	19	0
Midweek breaks	36	57	7	0
One night stays	29	50	21	0
Late bookings	43	36	21	0
Arrivals without booking	25	57	18	0
Staff	17	53	7	23
Visitors from:				
Holland	12	42	27	19
Germany	11	33	22	33
France	8	33	21	38
Ireland	4	35	17	43
Scandinavia	0	22	17	61
North America	0	14	5	82
Australia	8	24	20	48
Japan	0	4	4	91
Other	11	11	0	78

Table 32

Major Trade Groups 2005 compared with 2004
Touring Sites based on 35 responses

Category	Said major part of business %	More %	Same %	Fewer %	None %
Young couples	3	21	66	10	3
Families (with young children)	29	48	44	0	7
Families (with teenage children)	14	21	38	34	7
Middle-aged couples	26	30	57	13	0
Retirement age	11	31	53	16	0

Businesses were asked which categories represented the major part of their trade, and how visitor numbers in each category had changed compared with 2004. The summary of replies is shown by percentage of businesses replying.

Table 33

Visitor Numbers to Attractions in Devon 2005

Attraction	Location	Visits 2003	Visits 2004	Visits 2005	Visits % 04/05 +/-	Adult Admission 2005 £
A La Ronde	Exmouth	25191	25979	27216	+5	4.50
Arlington Court	Arlington	76391	74049	67326	-9	6.50
Berry Pomeroy Castle	Berry Pomeroy	18016	18568	23451	+26	3.17
Big Sheep	Abbotsham	90000	99052	106783	+8	7.50
Braunton & District Museum	Braunton	9000	7735	6129	-21	-
Brixham Heritage Museum	Brixham	7613	7640	8762	15	1.50
Castle Drogo	Drewsteignton	121380	120376	117400	-2	6.50
Chambercombe Manor	Ilfracombe	7000	7500	8000	+7	5.00
Clovelly Village	Clovelly	186000	180000	175000	-3	4.50
Cobbaton Combat Collection	Chittlehampton	12500	11800	11008	-7	5.00
Coleton Fishacre House	Dartmouth	62572	62921	66609	+6	5.50
Combe Martin Wildlife & Dinosaur Park	Combe Martin	200000	210000	210000	0	12.00
Dartmouth Castle	Dartmouth	29786	34795	36865	+6	3.70
Fairlynch Arts Centre & Museum	Budleigh Salterton	2012	2424	1778	-27	2.00
Finch Foundry	Sticklepath	18763	19789	18659	-6	3.70
Garden House	Buckland Monachorum	39200	28066	21738	-23	5.00
Haldon Belvedere (Lawrence Castle)	Higher Ashton	1533	1333	1457	+9	2.00
High Cross House, Dartington Hall	Totnes	1366	1209	1513	+25	3.50
Holsworthy Museum	Holsworthy	1947	1247	1088	-13	0.50
Ilfracombe Museum	Ilfracombe	20405	20653	18721	-9	2.00
Kents Cavern Showcaves	Torquay	83000	88000	85000	-3	6.50
Killerton House & Garden	Broadclyst	149319	134628	133522	-3	6.50
Knights Hayes Court	Bolham	99822	88593	86832	-2	6.50
Northam Burrows Country Park	Northam	220000	250000	250000	0	3.00
Okehampton Castle	Okehampton	9974	9082	9584	+6	2.96
Otterton Mill Centre	Otterton	109000	118000	138000	+17	-
Overbecks Museum	Sharpitor	36056	31862	33689	+6	5.00
Paignton Zoo	Paignton	457539	486728	448329	-8	10.00
Plym Valley Railway Centre	Plymouth	5000	8000	8000	0	1.20
Quay House Visitor Centre	Exeter	22874	22889	23471	+3	-
Rosemoor Garden	Torrington	128681	118837	117641	-1	5.50
Saltram House	Plympton	68352	68010	67000	-1	7.50
Seaton Tramway	Seaton	112071	112889	114065	+1	6.00
Shute Barton	Shute	2092	3161	2057	-35	2.50
Stuart Line Cruises	Exmouth	260000	265000	260000	-2	4.50
Teignmouth Museum	Teignmouth	3500	3600	4000	+11	1.00
Totnes Castle	Totnes	24064	23098	22634	-2	2.10
Totnes Guildhall	Totnes	1919	1380	1380	0	1.00

Table 34

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 2004 to October 2005 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.