Visitor Economy Report for Devon

QUARTER 3 2025

July - September 2025

South West
Visitor Economy Hub
Devon

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This Visitor Economy Report for Devon includes all the latest data and analysis for the third quarter (July-September) of 2025; there is also a Somerset version of this report.

The South West Visitor Economy Hub (SWVEH or The Hub) is an online database providing organisations with real-time intelligence, from visitor arrivals, profile and perceptions, to expenditure, economic impact, and forward-looking data. Visit www.swvehub.co.uk for more details and to request access.

In addition to accessing the online database and the Visitor Economy reports, a consultancy service is available for bespoke research relating to the visitor economy in specific destinations across Devon and Somerset.

Email: contact@swvehub.co.uk to enquire further.

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Arrows show percentage change. Figures are benchmarked against same quarter in 2024

ACCOMMODATION

Serviced - All Devon

HOTEL

Room Occupancy Rate
81.4%

↓ 0.4%

Short Term Rental

East Devon

Occupancy Rate
72.6%
↑ 0.5%

£ Average Daily Rate
£192
↑ £7

English Riviera

Occupancy Rate
72.7%
↑ 3.2%

£ Average Daily Rate
£202
↑ £17

Exeter

Occupancy Rate
75.0%
↑ 4.0%

£ Average Daily Rate
£133
↑ £5

North Devon

Occupancy Rate
74.5%
↑ 0.9%

£ Average Daily Rate
£242
↑ £24

Plymouth

Occupancy Rate
68.5%
↑ 3.3%

£ Average Daily Rate
£126
↓ £3

South Devon

Occupancy Rate
63.0%
↓ 0.9%

£ Average Daily Rate
£222
↑ £22

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ACCOMMODATION

Serviced accommodation (hotels, guest houses, and similar) are performing at about the same level of occupancy as in the same quarter in 2024, just 0.4% down.

However short-term rental performance strengthened across most Devon regions in Q3 2025 compared with 2024. Occupancy increased in all areas, with the largest rises in Exeter (+4%), Plymouth (+3.3%) and the English Riviera (+3.2%). East Devon and North Devon saw only marginal gains. Average daily rates (ADR) also grew in most regions, particularly in North Devon (+£24), South Devon (+£22) and the English Riviera (+£17), indicating strong pricing power in coastal markets. Plymouth was the only area where ADR decreased (-£3), despite occupancy growth. Overall, demand remained robust, with coastal destinations showing the strongest revenue uplift.

VISITOR MOVEMENTS & WEATHER

Well over over one half (59%) of all attractions in Devon reported more visitors in Q3 2025 than the same quarter in 2024. Paid attractions didn't perform quite as well as this, with just over one half (53%) experiencing fewer visitors. Indoor attractions suffered the most with a decline in visitors at 71% of all attractions reporting; mixed (indoor and outdoor) attractions performed slightly better (62% reporting a decline in visitors).

Visits to tourism information centres in the county were down just under 1%, possibly suggesting a slightly decreased visitor footfall or showing the increasing trend for seeking information through mobile technology

The weather can impact visitor movements, affecting both indoor and outdoor activities. Overall, Q3 2025 was warmer and drier than the same quarter in 2024. August 2025 was slightly wetter than August 2024, but the difference was marginal.

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Percentage shows share of attractions that have experienced growth or decline in visitor numbers.

ATTRACTIONS

All

↓ 41%

↑ 59%

Paid

↓ 53%

↑ 47%

Free

Sample too small

Indoor

↓ 71%

↑ 29%

Mixed

↓ 62%

↑ 38%

Outdoor

Sample too small

Arrows show percentage change. Figures are benchmarked against same quarter in 2024

TOURIST INFORMATION CENTRES

↓ 0.9%

WEATHER

July

Average Maximum Temperature
22.6°C

↑ 2.6°C

Average Daily Rainfall
1.3 mm

↓ 2.0mm

August

Average Maximum Temperature
21.9°C

↑ 1.1°C

Average Daily Rainfall
2.4 mm

↑ 0.9mm

September

Average Maximum Temperature
17.9°C

↓ 0.1°C

Average Daily Rainfall
4.1 **mm**

↓ 0.5mm

Percentage distribution of length of stay groups.

CAR PARKS - STAY DISTRIBUTION

East Devon

30 minutes	30mins - 2 hour	2 hours- 4 hours	Daily
10.1%	47.3%	28.1%	14.5%

English Riviera

30 minutes	30mins - 2 hour	2 hours- 4 hours	Daily
10.1%	46.9%	28.2%	14.8%

Exeter

30 minutes	30mins - 2 hour	2 hours- 4 hours	Daily
3.5%	42.3%	26.2%	28.0%

North Devon

30 minutes	30mins - 2 hour	2 hours- 4 hours	Daily
8.6%	56.6%	15.5%	19.3%

Plymouth

30 minutes	30mins - 2 hour	2 hours- 4 hours	Daily
0.1%	64.5%	21.8%	13.6%

South Devon

30 minutes	30mins - 2 hour	2 hours- 4 hours	Daily
5.4%	55.3%	25.3%	14.0%

CAR PARKS - STAY DISTRIBUTION

Across all regions, 2-hour tickets remain the dominant parking duration, representing around half or more of all stays. This pattern is strongest in Plymouth and North Devon, where short visits appear to be the norm, likely reflecting quick trips to shops or services.

Four-hour tickets consistently make up around a quarter of parking activity, with slightly higher proportions in Exeter and English Riviera, suggesting these areas attract longer leisure or tourism-related stays. Daily tickets account for approximately 14–19% of usage in most places, though Exeter shows a noticeably higher share of daily stays compared to 30-minute tickets, reinforcing its role as a destination where visitors remain longer, such as for work, study or tourism.

Short 30-minute stays represent a small share everywhere, and for the purpose of visitor economy are of little interest. Visitors choosing to park for 30 mintes or fewer tend not to be 'visitors'. It is worth nothing that parking stays of less than 1 hour are available at very few car parks in Plymouth which skews the data away from this length of stay bracket. Overall, the pattern indicates broadly similar visitor behaviour across Devon, with regional variations reflecting different mixes of retail, tourism and commuter parking demand.

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FOOTFALL ORIGIN - UK REGIONS

East Devon

London	South East	West Midlands	Other
11.0%	26.5%	21.7%	40.7%
0%	↓ 0.7%	↓ 0.8%	↑ 1.6%

English Riviera

East Midlands	South East	West Midlands	Other
10.2%	17.1%	25.1%	47.5%
↓ 0.6%	↑ 0.6%	↓ 0.4%	↑ 0.4%

Exeter

London	South East	West Midlands	Other
19.3%	29.1%	11.4%	40.2%
↑ 0.3%	↑ 0.8%	0%	↓ 1.0%

North Devon

East Midlands	South East	West Midlands	Other
11.2%	25.4%	22.1%	41.3%
↑ 0.4%	↑ 0.3%	↓ 0.4%	↓ 0.2%

Plymouth

London	South East	West Midlands	Other
13.3%	25.1%	12.7%	48.8%
↑ 0.2%	↑ 0.2%	↓ 0.6%	↑ 0.2%

South Devon

London	South East	West Midlands	Other
12.7%	24.9%	18.1%	44.2%
↑ 0.6%	↑ 1.7%	↓ 1.5%	↓ 0.9%

FOOTFALL ORIGIN - UK REGIONS

In all six regions, the largest share of visitors comes from the “Other” category, indicating strong domestic dispersal beyond the key origin regions. South East England is consistently strong of the three named origins, contributing around a quarter of visits across most destinations. London and the West and East Midlands play a smaller but still notable role, though their relative importance varies.

Exeter attracts the highest share from London compared with other destinations, suggesting stronger transport links and city-to-city travel patterns. North Devon and East Devon both show similar contributions from South East and West Midlands, but again with “Other” remaining dominant.

Between 2024 and 2025, most destinations see small percentage changes rather than major shifts. The most notable increases tend to be from the South East, while the West Midlands contribution shows slight declines in several locations.

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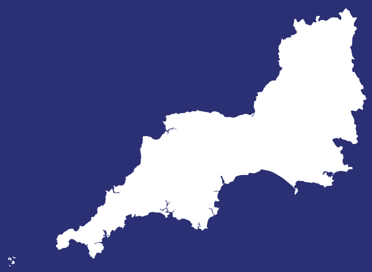
Top markets by destination



FOOTFALL ORIGIN - SOUTH WEST

East Devon

Somerset	City of Bristol	Wiltshire	Cornwall	Dorset
19.7%	8.4%	6.9%	6.1%	5.6%

English Riviera

Plymouth	Somerset	Cornwall	Wiltshire	City of Bristol
16.6%	11.1%	9.9%	5.7%	2.0%

Exeter

Somerset	Cornwall	Plymouth	North Devon	South Hams
17.4%	12.4%	9.3%	8.2%	7.7%

North Devon

Somerset	City of Bristol	Wiltshire	Cornwall	East Devon
12.3%	9.3%	8.6%	8.5%	5.3%

Plymouth

Cornwall	Teignbridge	Torbay	Somerset	East Devon
31.2%	10.6%	9.7%	6.6%	6.6%

South Devon

Cornwall	Somerset	City of Bristol	Plymouth	East Devon
16.6%	12.4%	6.3%	6.2%	6.0%

FOOTFALL ORIGIN - SOUTH WEST

Across all six Devon destinations, visitors come predominantly from within the wider South West region. Whilst not featured in the infographic, the 'Other South West' category consistently has the largest share of visitors indicating that travel into each destination is widely dispersed across many South West areas rather than concentrated in a small number of neighbouring counties. Somerset is a particularly strong contributor across multiple destinations, suggesting frequent short-distance leisure and day-trip travel between Somerset and Devon. Cornwall also features prominently in several destinations, especially in South Devon and Plymouth, pointing to strong cross-border coastal visitation.

Plymouth stands out as a key source area for the English Riviera and lesser so, Exeter and South Devon, reflecting close urban–coastal travel patterns and in the case of Exeter, convenient transport links. Bristol and Wiltshire also contribute to several destinations, particularly North Devon, indicating broader regional reach from population centres in the morthern and eastern areas of the South West.

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Percentage distribution of consumers.

VISITOR DEMOGRAPHICS - AGE

East Devon

18-24	25-34	35-44	45-54	55-64	65+
2% ↓ 2%	12% ↓ 0.5%	17% ↓ 0.6%	19% ↓ 0.3%	22% ↑ 0.2%	27% ↑ 1.3%

English Riviera

18-24	25-34	35-44	45-54	55-64	65+
3% ↓ 0.5%	13% ↓ 0.7%	20% ↓ 0.1%	20% ↓ 0.5%	22% ↓ 0.2%	22% ↑ 1.4%

Exeter

18-24	25-34	35-44	45-54	55-64	65+
5% ↓ 0.7%	15% ↓ 0.5%	17% ↑ 0.3%	24% ↓ 1.0%	23% ↑ 0.4%	17% ↑ 1.4%

North Devon

18-24	25-34	35-44	45-54	55-64	65+
2% ↓ 0.4%	13% ↓ 0.8%	20% 0%	21% ↓ 0.5%	23% ↑ 0.7%	21% ↑ 1.0%

Plymouth

18-24	25-34	35-44	45-54	55-64	65+
5% ↓ 0.4%	17% ↓ 0.2%	19% ↑ 0.5%	22% ↓ 0.7%	21% ↑ 0.2%	16% ↑ 0.6%

South Devon

18-24	25-34	35-44	45-54	55-64	65+
3% ↓ 0.5%	14% ↓ 0.6%	18% 0%	21% ↓ 0.9%	23% ↑ 0.2%	22% ↑ 1.8%

VISITOR DEMOGRAPHICS - AGE

The age distribution of visitors shows distinct differences between the six Devon regions. Exeter and Plymouth attract the youngest visitor profiles, with the highest proportions of 18–24 and 25–34 year olds, reflecting their roles as university, employment and nightlife centres. In contrast, East Devon, North Devon, South Devon and the English Riviera attract proportionally older visitors, with the highest shares in the 55–64 and 65+ age groups, consistent with their stronger appeal for coastal leisure, relaxation and longer-stay tourism.

Across all regions, the share of visitors aged 18–24 declines slightly from 2024 to 2025, while the 65+ age group increases, due in part to a gradual ageing of the visitor base. The 35–54 age group remains relatively stable across most regions and continues to represent a substantial portion of visitors, particularly to Exeter.

Consistent growth in all regions for the 65+ category reflects the UK national growth rate of this age group.

Overall, the results indicate two broad visitor patterns: younger, more mixed-age urban visits to Exeter and Plymouth, and older, leisure-oriented coastal visits to the rest of Devon.

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Percentage of respondents in each category. Sample size too small to report for East Devon area.

VISITOR DEMOGRAPHICS

Accessibility Requirements

English Riviera	Exeter	North Devon	Plymouth	South Devon
11.4%	6.2%	10.9%	8.3%	11.3%

Children

English Riviera	Exeter	North Devon	Plymouth	South Devon
17.1%	20.2%	18.3%	21.1%	17.8%

No Children

English Riviera	Exeter	North Devon	Plymouth	South Devon
73.6%	73.8%	76.3%	70.0%	73.0%

TRIP CHARACTERISTICS

Dogs on Holiday

	English Riviera	Exeter	North Devon	Plymouth	South Devon
🟩	16.0%	6.8%	20.2%	14.7%	20.8%
🟧	5.1%	0.4%	8.3%	6.2%	5.3%

🟩 Took a dog on overnight stay

🟧 Would have taken a dog if accommodation allowed

VISITOR DEMOGRAPHICS

The proportion of visitors with accessibility requirements varies across the five Devon regions but generally sits between 6% and 11%. Exeter has the lowest share at just over 6%, suggesting a comparatively younger or more mobile visitor profile, while the English Riviera, South Devon and North Devon show the highest levels (around 11%), reflecting their popularity among older visitors and those seeking more traditional seaside and countryside experiences. Plymouth sits mid-range at just over 8%.

When looking at visitors with dependent children, Plymouth and Exeter have the highest proportions (around 21% and 20% respectively), reinforcing their roles as larger urban destinations offering family-friendly attractions, amenities and transport accessibility. In contrast, the English Riviera, South Devon and North Devon have slightly lower levels of family visitors (around 17–18%), with a larger majority travelling without children — typically older couples, adult groups, or empty-nest households.

TRIP CHARACTERISTICS

Visitors to North and South Devon were most likely to take a dog on holiday with them (around 20%), with Exeter (around 7%) being the destination with least visitors travelling with a dog. North Devon (over 8%) was where most visitors stated that they would have brought their dog if their accommodation allowed.

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Sample size too small to report for East Devon area.

TRIP CHARACTERISTICS

Length of stay (hours) - Day Visits

English Riviera	Exeter	North Devon	Plymouth	South Devon
6.9	6.4	9.0	6.5	7.9

Length of stay (nights) - Overnight Visits

English Riviera	Exeter	North Devon	Plymouth	South Devon
5.5	3.9	4.9	5.6	6.1

Use of Public Transport

English Riviera	Exeter	North Devon	Plymouth	South Devon
15.4%	28.6%	4.3%	21.3%	10.4%

TRIP CHARACTERISTICS

South Devon has the longest overnight duration at around 6.1 nights, followed by Plymouth (5.6 nights) and the English Riviera (5.5 nights), suggesting strong appeal for longer coastal and leisure holidays. North Devon also has relatively long stays (4.9 nights), while Exeter has the shortest average visit length (3.9 nights), reflecting its more urban and short-break character.

Day visits show a similar pattern. North Devon stands out with the longest average day trip at around 9 hours. South Devon and the English Riviera also see extended day visits (7–8 hours), whereas Exeter and Plymouth day visits are slightly shorter (around 6–6.5 hours).

Public transport usage to travel to each destination varies significantly. Trips to Exeter have the highest use of buses and trains (around 29%), reflecting strong connectivity and urban travel patterns. Trips to Plymouth also have relatively high usage (21%). In contrast, trips to North Devon have very low public transport usage (around 4%), illustrating a strong reliance on car travel in more rural and coastal areas due to limited public transport.

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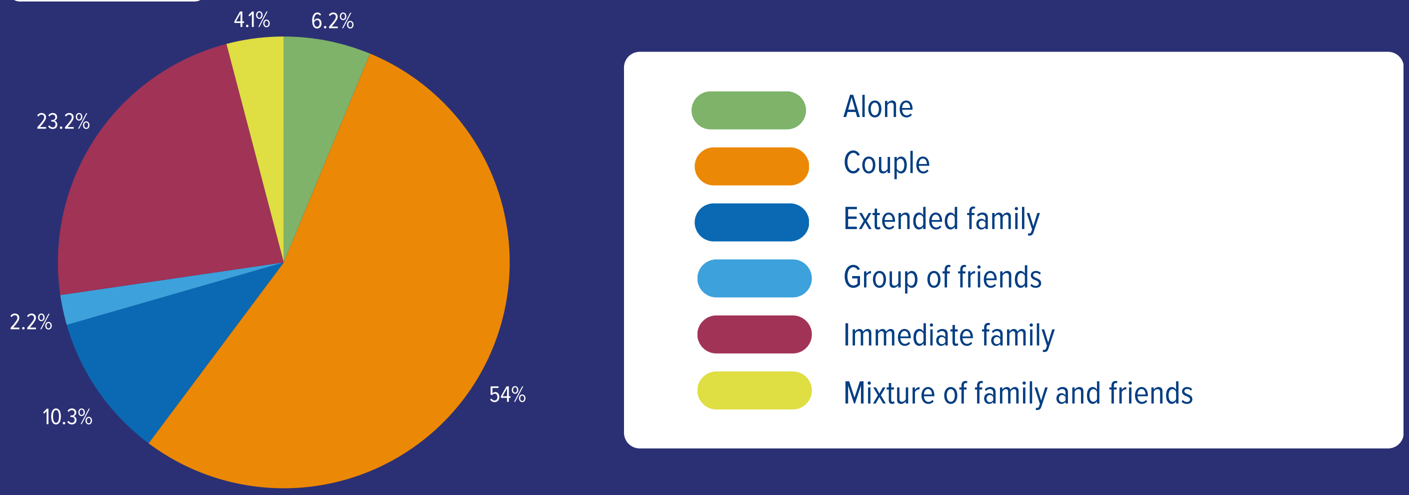
Sample size too small to report for East Devon area.

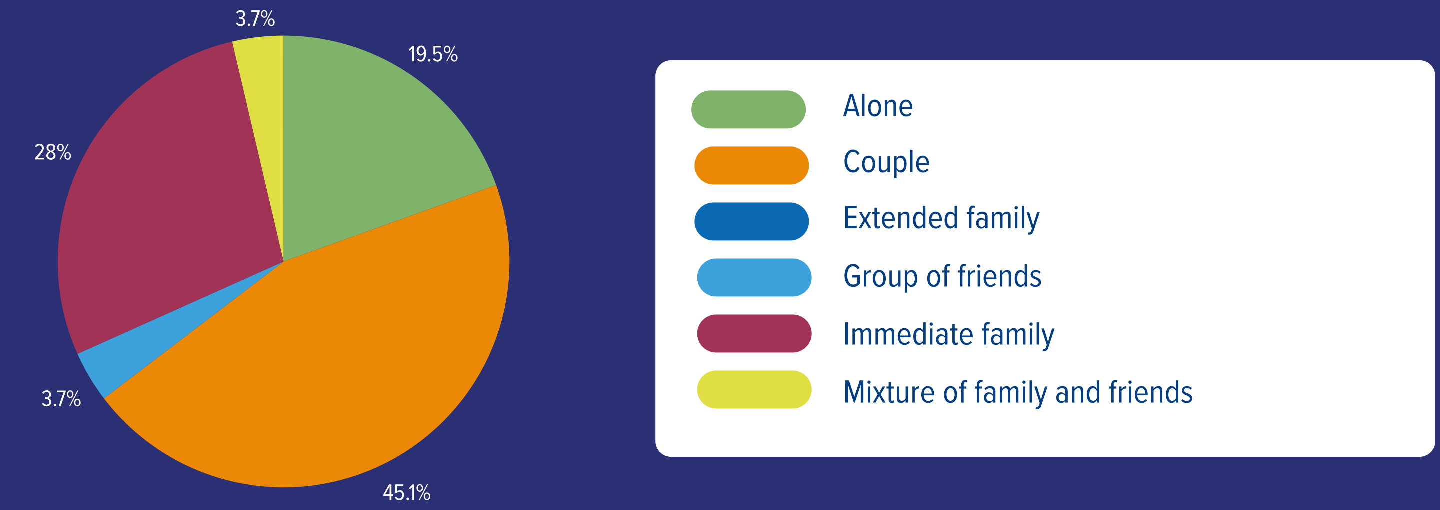
TRIP CHARACTERISTICS

Travel Group

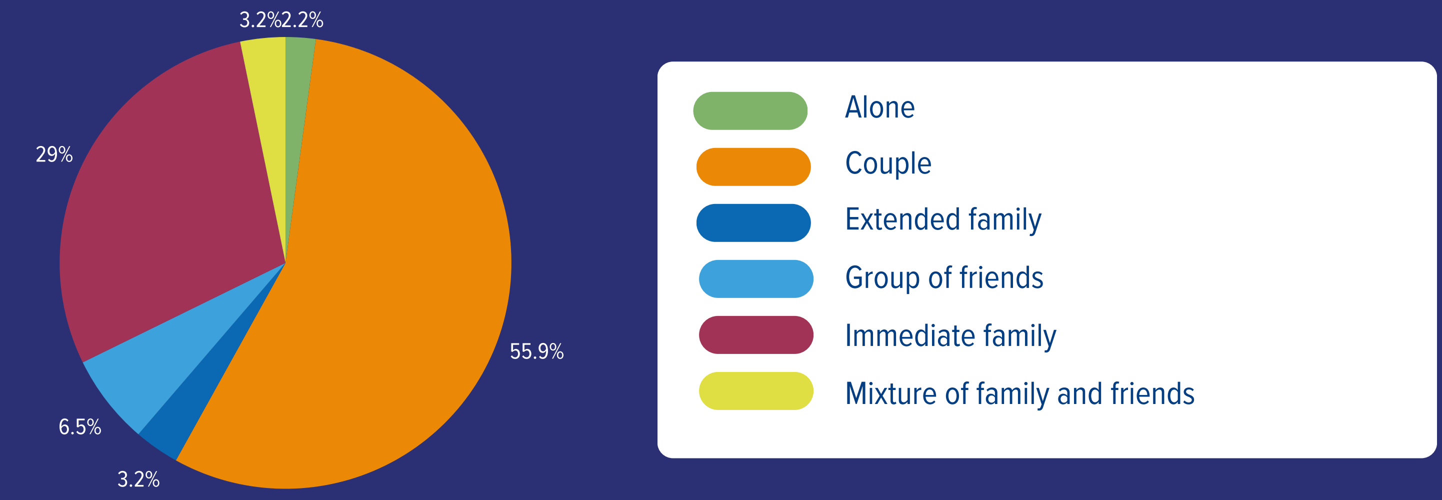
English Riviera



Exeter



North Devon

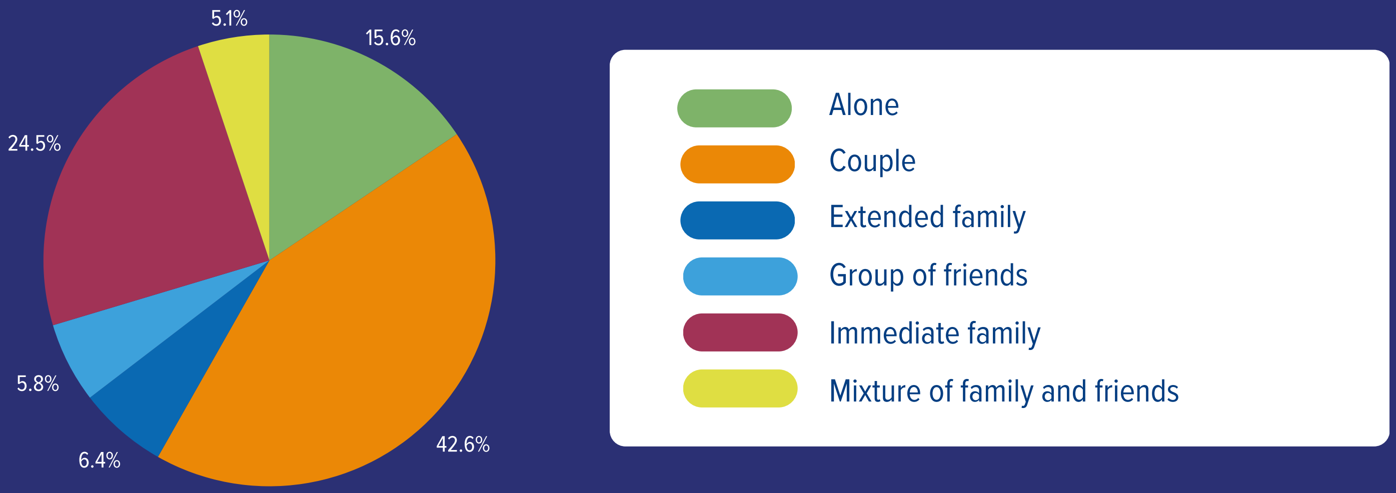


Sample size too small to report for East Devon area.

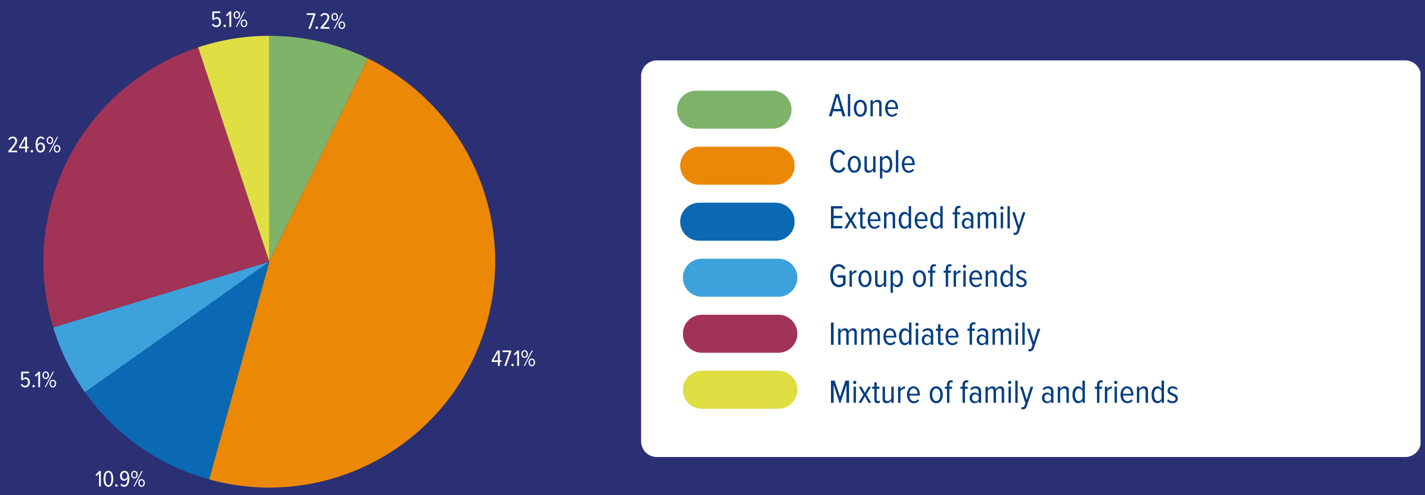
TRIP CHARACTERISTICS

Travel Group (continued)

Plymouth



South Devon



TRIP CHARACTERISTICS

Travel Group

Across the five Devon regions, couples represent the largest travel group in every destination, indicating that Devon strongly appeals to pairs seeking leisure breaks. This is especially pronounced in the English Riviera and North Devon, where couple travel volumes are particularly high. It's worth noting that with increased disposable income and greater flexibility in scheduling, older/childless couples represent a key demographic in the travel sector.

Immediate families also form a significant proportion of visitors, especially in North Devon and Exeter, highlighting the importance of beaches and family-friendly attractions in these areas. Extended family travel is present but notably smaller, suggesting that multigenerational visits are less common. Quarter 3 travel is heavily dominated by the school Summer Holiday period, and this is likely seen across most UK destinations.

Travel with groups of friends is less frequent overall, though Plymouth and North Devon show a relatively higher proportion compared with other destinations.

Overall, Devon's visitor profile is dominated by couples and immediate families, with smaller but notable contributions from solo travellers and mixed-group travel.

Technical Notes

Serviced accommodation: Based on data collected in the Hub, provided directly by serviced accommodation providers such as hotels, B&Bs and guesthouses.

Short-term rental: Data sourced from Airdna.

Attractions: Based on data collected in the Hub, provided directly by attraction providers.

Tourist Information Centres: Based on data collected in the Hub, provided directly by TICs and visitor centres in the region.

Weather: Based on an average of weather station readings at Chivenor, Exeter and Plymouth.

Car Parks - Stay Distribution: Data on car park stays of consumers using RingGo app for payment. Sample is representative of all consumers.

Footfall Origin - UK Regions: Data sourced from BT Active Intelligence mobile phone analytics. This analysis excludes visitors to areas from the South West. Visitors are classified as those having travelled more than 20 miles to the destination.

Footfall Origin - South West: Data sourced from BT Active Intelligence mobile phone analytics. This analysis focuses on visitors who reside in the South West. Visitors are classified as those having travelled more than 20 miles to the destination.

Visitor Demographics - Age: Data sourced from BT Active Intelligence mobile phone analytics. This analysis focuses on all visitors who have travelled further than 20 miles to the destination. Under 18's are excluded from this analysis. Infographics show percentage of each age group and percentage change on last year’s Q3 visitors.

Visitor Demographics - Accessibility Requirements: Data sourced from the SWVEHub Visitor Survey. Respondents answered the question 'Do you have any accessibility requirements?"

Visitor Demographics - Children : Data sourced from the SWVEHub Visitor Survey. Respondents who said they had dependent children of primary or secondary school age, living at home.

Visitor Demographics - No Children : Data sourced from the SWVEHub Visitor Survey. Respondents who said they had no children living at home.

Trip Characteristics - Dogs on holiday : Data sourced from the SWVEHub Visitor Survey. Respondents who were asked if they brought a dog with them on their overnight stay.

Trip Characteristics - Length of Stay: Data sourced from the SWVEHub Visitor Survey.

Trip Characteristics - Use of public transport: Data sourced from the SWVEHub Visitor Survey. Respondents who travelled by public bus or train.

Trip Characteristics - Travel Group: Data sourced from the SWVEHub Visitor Survey. Respondents were asked who they travelled with.

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