

English Riviera Tourism Monitor



April 2014

Produced for and on behalf of The English Riviera
Tourism Company Ltd
by The South West Research Company Ltd



June 2014



Executive Summary

Compared to April 2013 businesses reported that:

April 2014 Visitor levels:

Increased 56% / Stayed the same 20% / Decreased 24%

Estimated actual change in visitors +9%

April 2014 Turnover levels:

Increased 53% / Stayed the same 21% / Decreased 26%

Estimated actual change in turnover +7.6%

April 2014 Profitability was:

Higher 35% / Stayed the same 31% / Decreased 35%

May 2014 Outlook is:

Better 16% / Same as last year 33% / Not as good 51%

Whitsun/May half-term 2014 Outlook is:

Better 11% / Same as last year 44% / Not as good 44%

Optimism

Optimism score is 6.18 out of a possible 10

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English Riviera Tourism Monitor



April 2014

Introduction



Background & Rationale

The ERTC has committed to undertake a range of research projects on the English Riviera to enable it to monitor its performance in delivering the new tourism strategy as well as the performance of the tourism industry in the area in general.

This monthly tourism monitor is part of that process. Each month, an online survey is distributed to ERTC Promotional Partners and other English Riviera businesses asking about business levels in the previous month to enable the ERTC to monitor business performance.

Wherever possible, this report will provide comparisons against regional data to enable the ERTC to benchmark its performance.

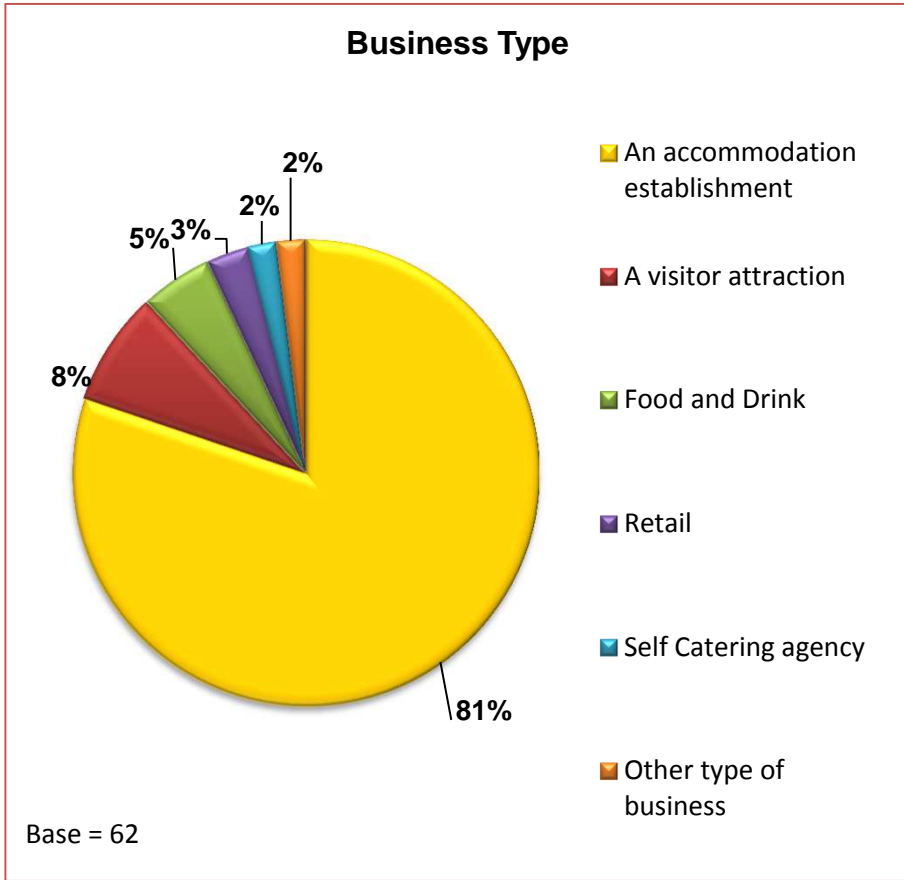
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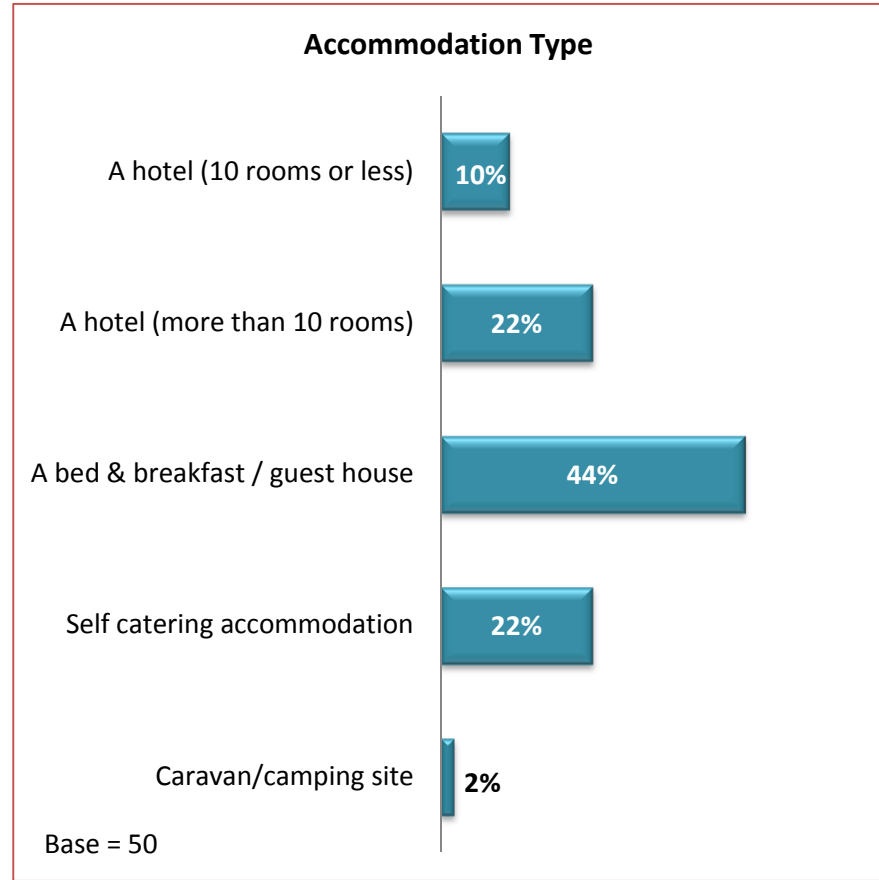
Sample Profile



Business Type

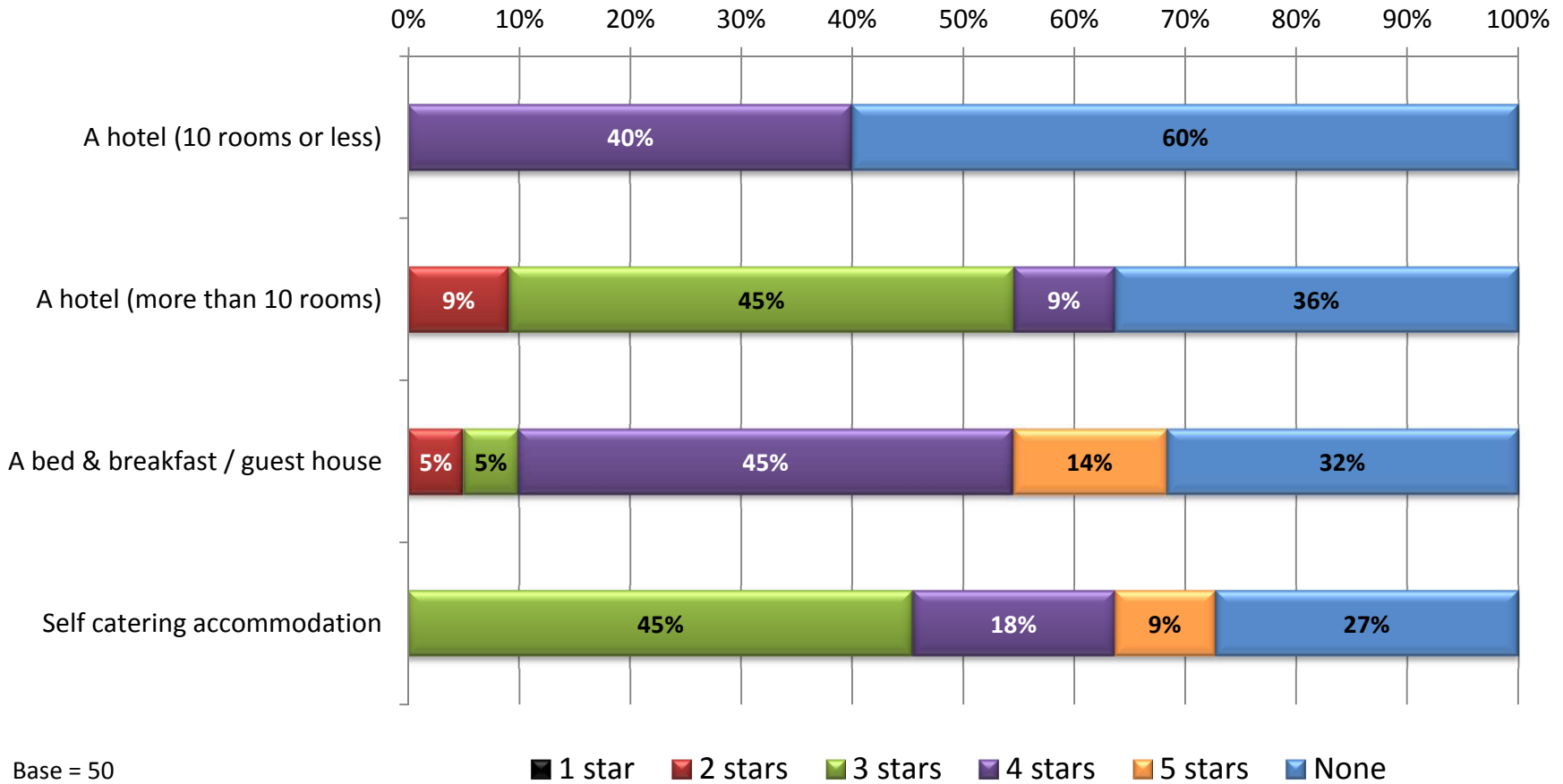


Accommodation providers account for 81% of responses, Visitor Attractions 8% and Food & Drink establishments 5%.



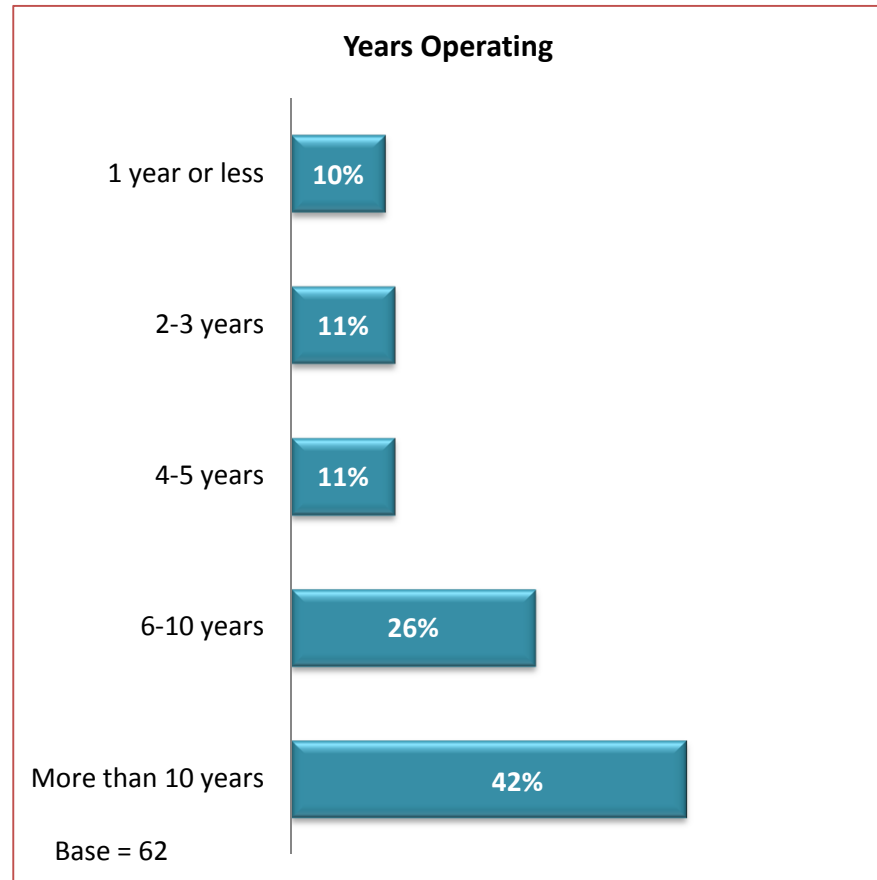
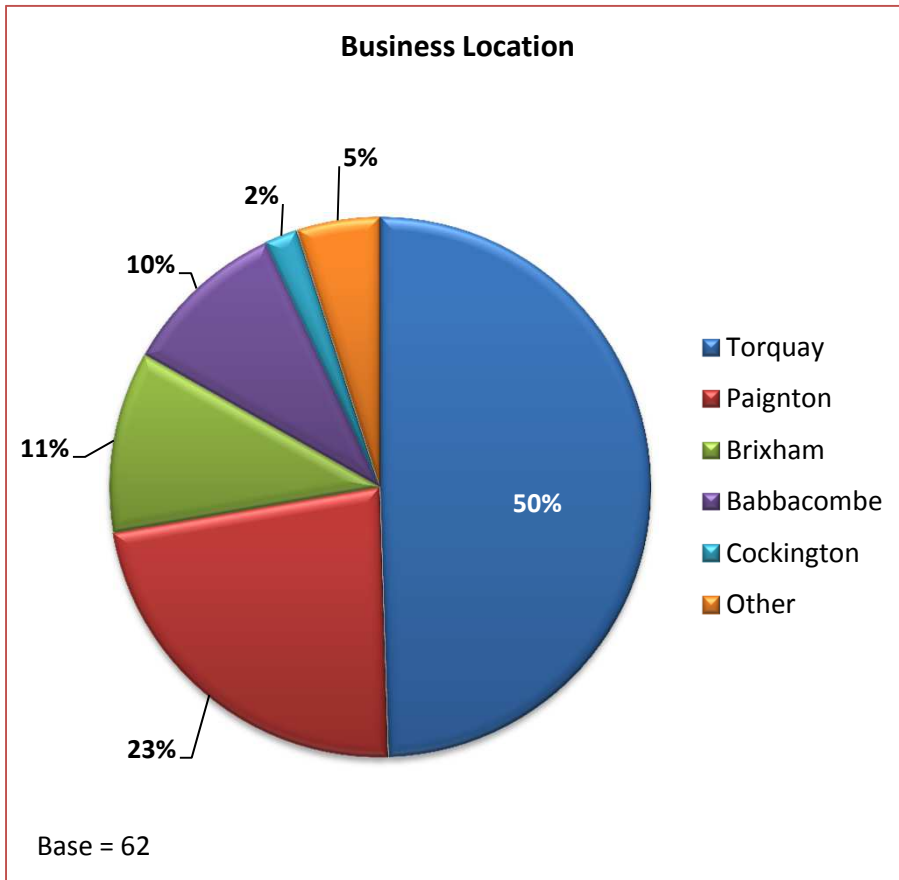
Serviced accommodation providers account for 76% of accommodation responses.

Accommodation Type and Rating



The majority of businesses responding to this survey have a quality rating, although 60% of Hotels with 10 rooms or less, 36% of Hotels with more than 10 rooms, 32% of B&B/Guest Houses and 27% of Self Catering accommodation providers are not graded.

Business Location and Years Operating



Torquay businesses account for 50% of responses with 23% from Paignton. A further 11% of businesses were from Brixham, 10% from Babbacombe and 2% from Cockington. 5% of businesses were based elsewhere in the resort.

68% of businesses have been operating for more than 6 years.

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April 2014

The Month in Context



April 2014 – The Month in Context

UK Weather

April was overall another rather warm month and was the fifth month in a row with UK average temperatures above average. The start and end of the month were rather unsettled, although pressure did build towards the middle of the month and most parts of England and Wales saw some fine weather between the 8th and the 19th with rainfall largely confined to north-west Scotland. During the last ten days, showers, thundery at times, affected mainly southern areas, with some localised downpours in places.

The UK mean temperature was 9.2 °C making it the equal third warmest April in a series since 1910, but not as warm as 2007 or 2011. Temperatures were above average in all areas. Rainfall was more variable across the country. Sunshine was close to average everywhere, with overall 101% of average sunshine hours.

Weather impacts

Although there were spells of fine early-spring weather there were also a few cases of dense fog at the beginning and end of the month. This caused minor travel disruption on roads and delays to flights at airports across the country. Heavy rain affected some areas during the last three days of the month, but despite some incidences of lightning there were no major impacts.

Early in the month some very high levels of air pollution were recorded from industrial sources in the UK and blown in from the continent along with fine Saharan dust that affected southern and eastern parts of the country. Those with lung and heart conditions were advised to avoid any strenuous activity and asthmatics warned of an increased risk of attacks during the period.

April 2014 – The Month in Context

The UK economy

The UK economy grew by 0.8% in the first quarter of 2014, according to the latest figures. It marks the fifth consecutive period of GDP growth - the longest positive run since the financial crisis.

George Osborne: "Britain is coming back, but we can't take that for granted". The Office for National Statistics (ONS) also said the economy is now 0.6% smaller than its 2008 peak.

Chancellor George Osborne said Tuesday's figure showed that "Britain is coming back", but that the recovery could not be taken for granted." "The impact of the Great Recession is still being felt, but the foundations for a broad based recovery are now in place," he added. "The biggest risk to economic security would be abandoning the plan that is laying those foundations."

Shadow chancellor Ed Balls said that despite the positive growth figure, "millions of hardworking people are still feeling no recovery at all". "Now that growth has finally returned, the question is whether ordinary working people will properly feel the benefit and we have a balanced recovery that's built to last," he added.

The ONS's first growth estimate for the quarter is a slight increase on the 0.7% recorded for the final quarter of 2013, and a rise of 3.1% on the same period a year ago. But many had been expecting it to be even higher, at 0.9%. "While this figure has missed estimates, slightly, the overall feeling is still one of strength in the UK," said Jeremy Cook, chief economist at currency brokers World First.

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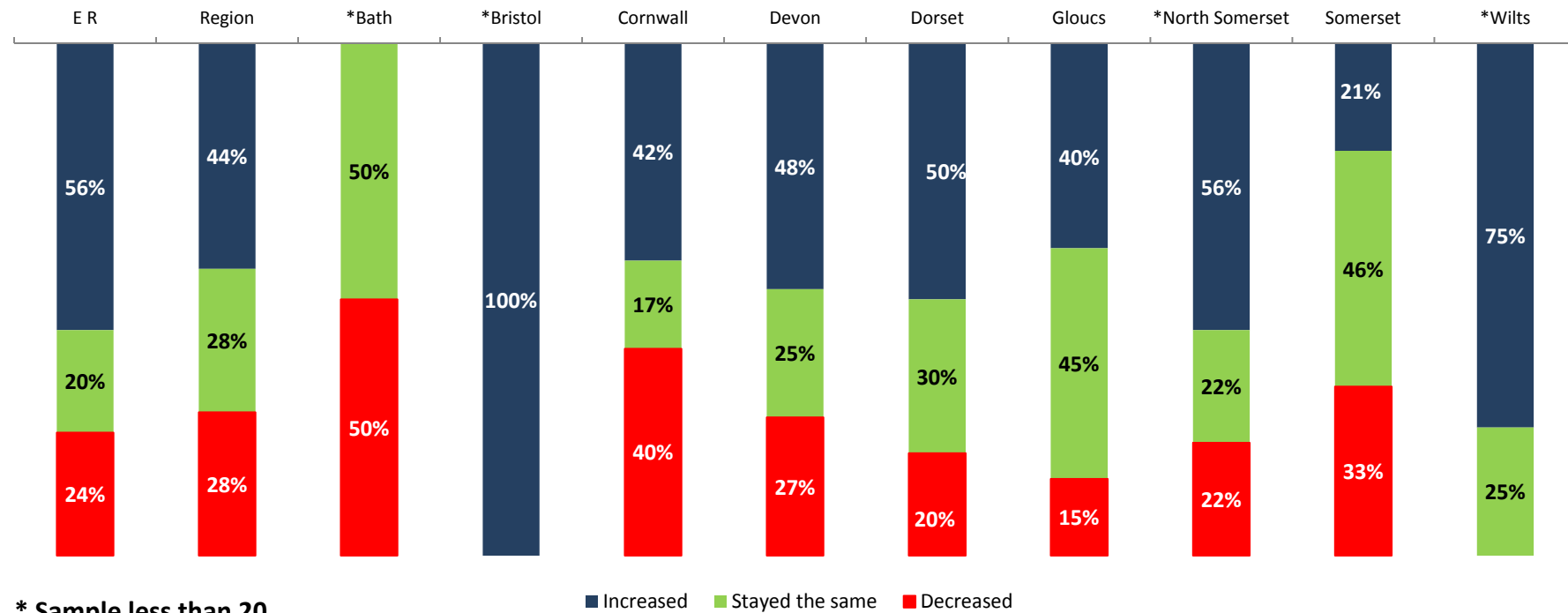
Performance

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Performance – Visitor Numbers (2014-2013)

76% of English Riviera businesses reported that their visitor numbers had increased (56%) or remained level (20%) compared with April 2013 – a slightly higher proportion when compared with the region as a whole during the same period (72%). 24% of businesses indicated that their visitor numbers had decreased compared with the same time last year (28% regionally).



Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	Gloucs	*North Somerset	Somerset	*Wilts
Increased	56%	44%	-	-	100%	42%	48%	50%	40%	56%	21%	75%
Stayed the same	20%	28%	50%	-	-	17%	25%	30%	45%	22%	46%	25%
Decreased	24%	28%	50%	-	-	40%	27%	20%	15%	22%	33%	-
Base	59	236	<5	-	<5	52	93	30	20	9	24	<5

Performance – Estimated occupancy levels April 2014

The slides to follow show the estimated occupancy for April 2014 for serviced and self-catering accommodation types. It should be noted that the figures provided represent the occupancy rates for those responding to this survey and the results are not weighted to represent regional and county/resort accommodation stocks.

ERTM SERVICED ROOM OCCUPANCY		
Feb-14	% RM OCCUPANCY	SAMPLE
English Riviera	68.04%	34
All hotels	71.96%	14
Hotel 10 rooms or less	21.52%	<5
Hotel more than 10 rooms	73.42%	10
B&B	32.09%	6
Guest House	31.72%	14
Torquay	70.50%	19
Paignton	47.56%	8
Brixham	53.42%	<5
Babbacombe	56.97%	<5
**Cockington	0.00%	0
Other English Riviera	76.67%	<5
Devon	66.40%	44
South West	63.21%	79

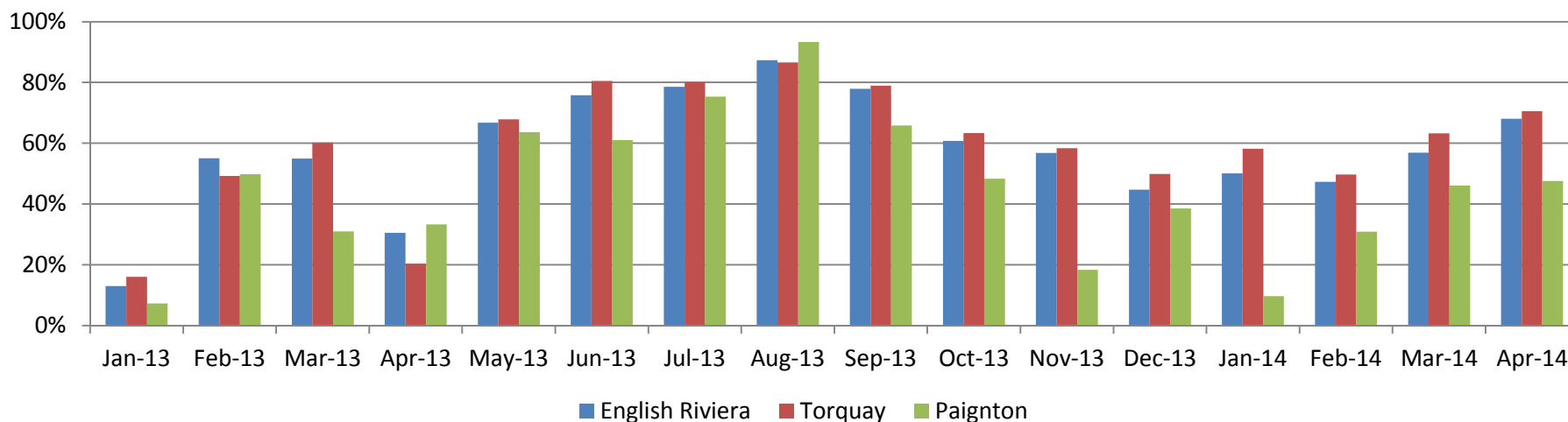
English Riviera serviced room occupancy was calculated at 68.04% for April 2014 compared with an average of 63.21% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for April 2014 was calculated at 43.17% compared with 61.36% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY		
Feb-14	% UNIT OCC	SAMPLE
English Riviera	43.17%	11
Self-catering accommodation	43.17%	11
Holiday Park	0.00%	0
Torquay	38.92%	5
Paignton	45.67%	6
Brixham	0.00%	0
Babbacombe	0.00%	0
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	58.18%	23
South West	61.36%	63

**Cockington data added to Torquay due to small sample

Performance – English Riviera estimated serviced accommodation occupancy levels 2013/14 by area



SERVICED ROOM OCCUPANCY	Jan-13	Feb-13	Mar-13	Apr-13	May-13	June-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
English Riviera	13.01%	55.01%	54.95%	30.50%	66.73%	75.79%	78.61%	87.34%	77.96%	60.75%	56.83%	44.72%	50.07%	47.32%	56.90%	68.04%
Torquay	16.05%	49.24%	60.20%	20.32%	67.83%	80.50%	80.10%	86.56%	78.96%	63.34%	58.40%	49.88%	58.22%	49.69%	63.22%	70.50%
Paignton	7.28%	49.79%	30.99%	33.32%	63.60%	61.06%	75.31%	93.28%	65.84%	48.34%	18.32%	38.51%	9.63%	30.84%	46.09%	47.56%
Brixham	*	*	*	*	*	*	*	82.19%	*	*	*	*	*	*	*	*
Babbacombe	10.38%	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Cockington	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Other English Riviera	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*

* Sample size less than 5

Performance – South West estimated serviced accommodation occupancy levels 2014 by area

During the month of April 2014 English Riviera serviced occupancy was higher than all other areas in the South West and the region as a whole.

Key comparisons;

South West – ER performance was higher than the regional average during January, February and April 2014.

Devon – ER performance was higher than Devon during January, February, March and April 2014.

<u>SERVICED ROOM OCCUPANCY</u>	Jan-14	Feb-14	Mar-14	Apr-14
South West	46.15%	47.12%	57.12%	63.21%
BANES	*	*	*	*
Bristol	*	*	*	*
Cornwall	*	36.61%	48.59%	50.82%
Devon	47.35%	44.94%	54.86%	66.40%
English Riviera	50.07%	47.32%	56.90%	68.04%
Dorset	54.58%	27.23%	*	44.59%
Gloucestershire	*	*	77.59%	41.92%
Somerset	32.48%	46.42%	37.22%	65.40%
Wiltshire	56.85%	59.82%	*	*

Performance – Estimated serviced accommodation occupancy levels 2014 by type

Key comparisons;

All ER Hotels – Higher than the regional average during January, February and April 2014.

ER Hotels (10 rooms or less) – Lower than the regional average during January and February 2014.

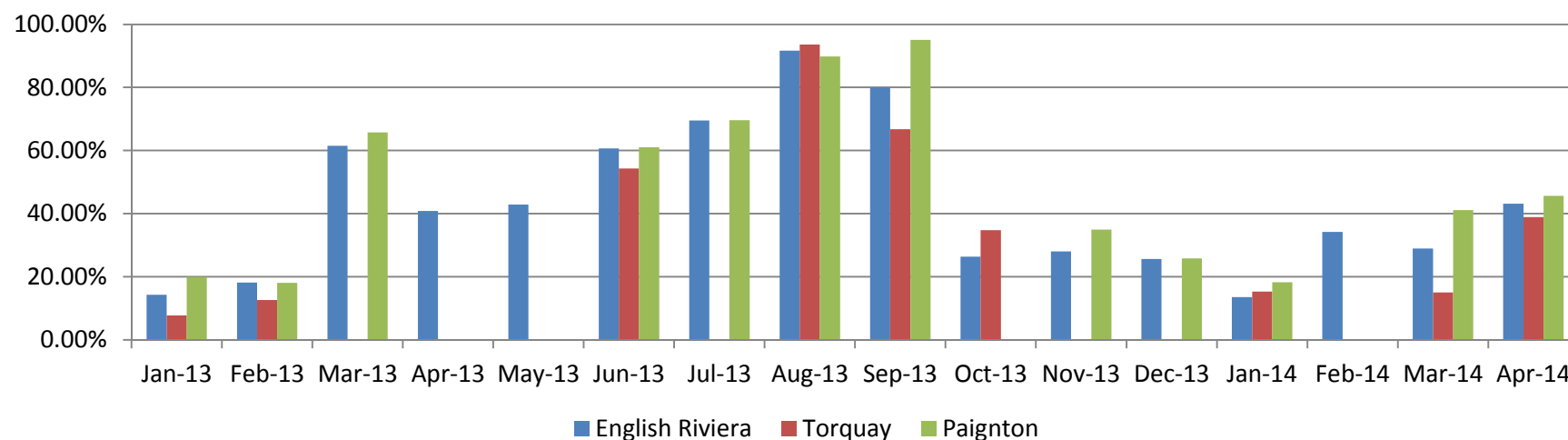
ER Hotels (more than 10 rooms) - Higher than the regional average during January and April 2014.

ER B&B/Guest House – Lower than the regional average during January, February, March and April 2014.

<u>SERVICED ROOM OCCUPANCY</u>	Jan-14	Feb-14	Mar-14	Apr-14
All ER hotels	55.42%	52.05%	61.01%	71.96%
All SW hotels	50.76%	51.93%	62.15%	67.71%
ER Hotel 10 rooms or less	12.36%	14.78%	*	*
SW Hotel 10 rooms or less	19.22%	26.75%	*	29.78%
ER Hotel more than 10 rooms	57.54%	54.40%	61.01%	73.42%
SW Hotel more than 10 rooms	52.93%	56.10%	62.54%	69.50%
ER B&B/Guest House	8.34%	17.56%	20.79%	31.82%
SW B&B/Guest House	23.00%	26.78%	23.34%	35.27%

* Sample size less than 5

Performance – English Riviera estimated self catering unit occupancy levels 2013/14 by area



SELF-CATERING UNIT OCCUPANCY	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
All ER Self-catering	14.23%	18.19%	61.52%	40.88%	42.86%	60.65%	69.57%	91.68%	79.96%	26.37%	28.01%	25.64%	13.52%	34.23%	28.98%	43.17%
Torquay	7.76%	12.64%	*	*	*	54.34%	*	93.62%	66.74%	34.79%	*	*	15.30%	*	15.00%	38.92%
Paignton	19.86%	18.06%	65.76%	*	*	61.05%	69.66%	89.78%	95.12%	*	34.90%	25.76%	18.22%	*	41.09%	45.67%
Brixham	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Babbacombe	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Cockington	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Other English Riviera	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*

* Sample size less than 5

Performance – Estimated self-catering unit occupancy levels 2014 by area

During the month of April 2014 English Riviera self-catering unit occupancy was lower than all other areas within the South West.

Key comparisons;

South West – ER performance was higher than the regional average during February 2014.

Cornwall – ER performance was higher than Cornwall during February 2014.

Devon – ER performance was higher than Devon during January 2014.

<u>SELF-CATERING UNIT OCCUPANCY</u>	Jan-14	Feb-14	Mar-14	Apr-14
South West	16.89%	12.88%	30.19%	61.36%
BANES	*	*	*	*
Bristol	*	*	*	*
Cornwall	15.25%	12.77%	36.89%	66.71%
Devon	12.76%	35.44%	33.21%	58.18%
English Riviera	13.52%	34.23%	28.98%	43.17%
Dorset	19.71%	7.40%	13.98%	48.33%
Gloucestershire	*	7.06%	*	88.79%
Somerset	19.23%	4.88%	17.89%	54.98%
Wiltshire	*	0.00%	*	*

* Sample size less than 5

Performance – Estimated self-catering unit occupancy levels 2014 by type

Key comparisons;

All ER Self-catering – Higher than the regional average during February 2014.

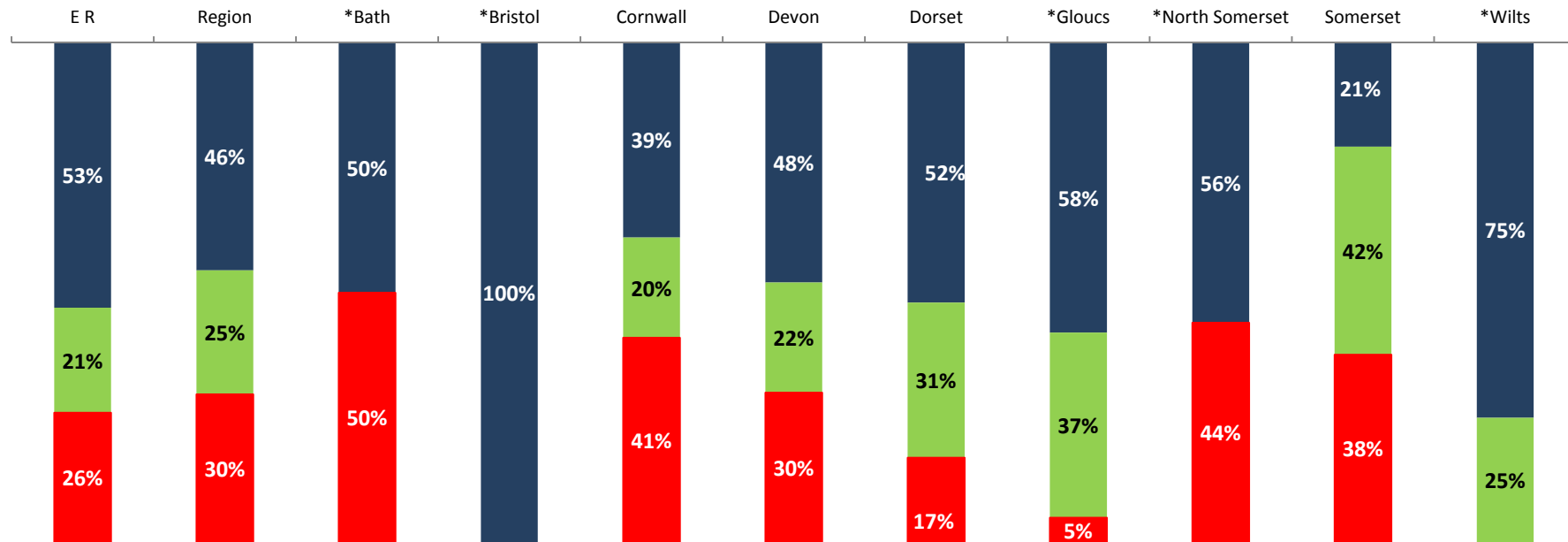
ER Self-catering (not including Holiday Parks) – Higher than the regional average in February and March 2014.

<u>SELF-CATERING UNIT OCCUPANCY</u>	Jan-14	Feb-14	Mar-14	Apr-14
All ER Self-catering	13.52%	34.23%	28.98%	43.17%
All SW Self-catering	16.89%	21.04%	30.19%	61.36%
ER Self-catering	13.52%	34.23%	28.98%	43.17%
SW Self-catering	16.89%	21.04%	26.18%	46.64%
ER Holiday Park	*	*	*	*
SW Holiday Park	*	*	32.47%	66.33%

* Sample size less than 5

Performance – Turnover (2014-2013)

74% of English Riviera businesses reported increased (53%) or level turnover (21%) during April 2014 compared with April 2013, a slightly higher proportion when compared with the region as a whole during the same period (71%). 26% of English Riviera businesses reported decreased turnover during April 2014 compared with 30% of businesses for the region as a whole.



* Sample less than 20

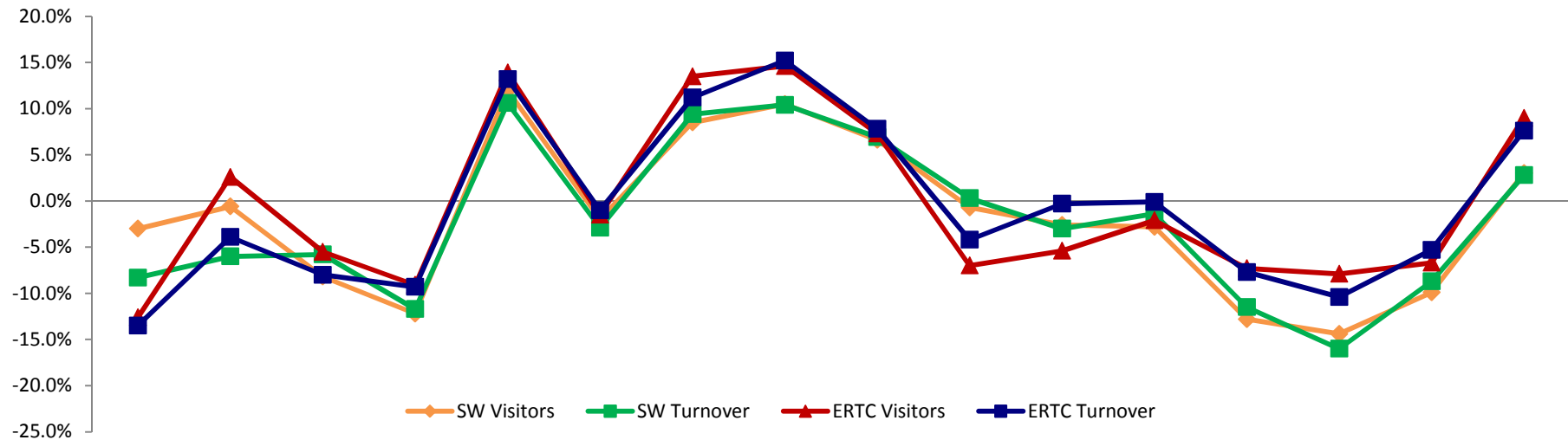
■ Increased ■ Stayed the same ■ Decreased

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	53%	46%	50%	-	100%	39%	48%	52%	58%	56%	21%	75%
Stayed the same	21%	25%	-	-	-	20%	22%	31%	37%	-	42%	25%
Decreased	26%	30%	50%	-	-	41%	30%	17%	5%	44%	38%	-
Base	57	230	<5	-	<5	51	90	29	19	9	24	<5

Performance – Estimated Actual Change To Previous Year

The chart below shows the ERTC and regional trend for the estimated actual change in visitors and turnover. For April 2014 English Riviera businesses reported increases of 9% in terms of visitors and 7.6% in terms of turnover compared with April 2013 which compares favourably against the regional average increases of 3% and 2.8% in terms of visitors and turnover during the same period.

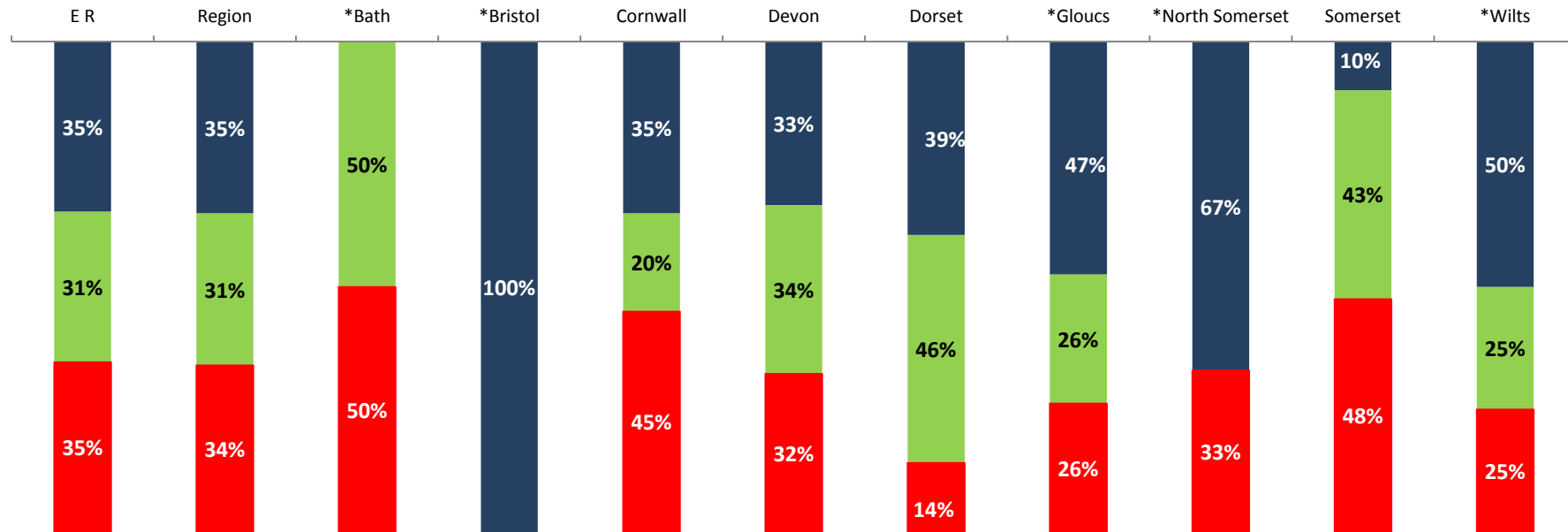
ERTC	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
Visitors	-12.6%	2.6%	-5.5%	-9.1%	13.9%	-1.5%	13.5%	14.6%	7.3%	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%	9.0%
Turnover	-13.5%	-3.9%	-8.0%	-9.3%	13.2%	-1.0%	11.2%	15.2%	7.8%	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%	7.6%



Region	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
Visitors	-3.0%	-0.6%	-8.2%	-12.2%	12.0%	-2.0%	8.5%	10.5%	6.6%	-0.7%	-2.6%	-2.8%	-12.8%	-14.4%	-9.9%	3.0%
Turnover	-8.3%	-6.0%	-5.8%	-11.7%	10.6%	-2.9%	9.4%	10.4%	6.9%	0.3%	-3.0%	-1.4%	-11.5%	-16.0%	-8.7%	2.8%

Performance – Profitability (2014-2013)

66% of all English Riviera businesses reported increased (35%) or level profitability (31%) for the month, the same proportions as the SW region as a whole during the same period. 35% of businesses reported theirs as being lower than during April 2013 (34% of SW businesses).



* Sample less than 20

■ Increased ■ Stayed the same ■ Decreased

Profitability	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	35%	35%	-	-	100%	35%	33%	39%	47%	67%	10%	50%
Stayed the same	31%	31%	50%	-	-	20%	34%	46%	26%	-	43%	25%
Decreased	35%	34%	50%	-	-	45%	32%	14%	26%	33%	48%	25%
Base	55	222	<5	-	<5	51	87	28	19	9	21	<5

English Riviera Tourism Monitor

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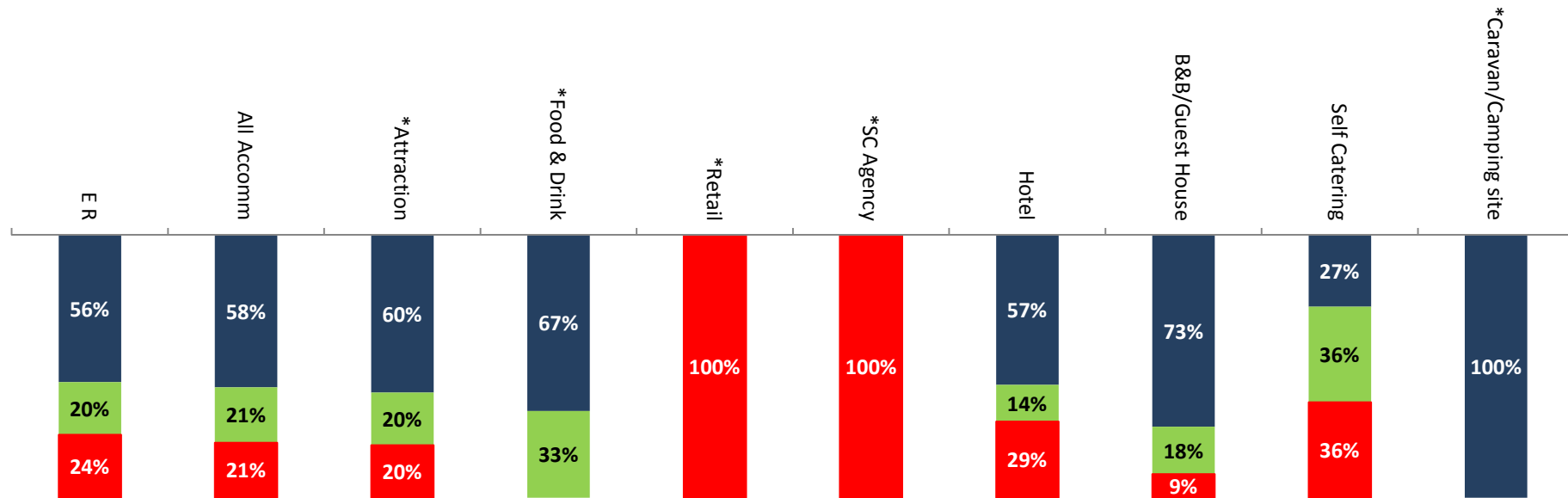
Business Type Performance

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Business Type Performance – Visitor numbers (2014-2013)

79% of all accommodation providers reported increased (58%) or level (21%) visitor numbers for April 2014. 73% of B&B/Guest Houses and 57% of Hotels reported increased visitor numbers for April 2014 compared with the same time last year. 36% of Self Catering operators and 29% of all Hotels reported decreased visitor numbers compared with the same time last year.



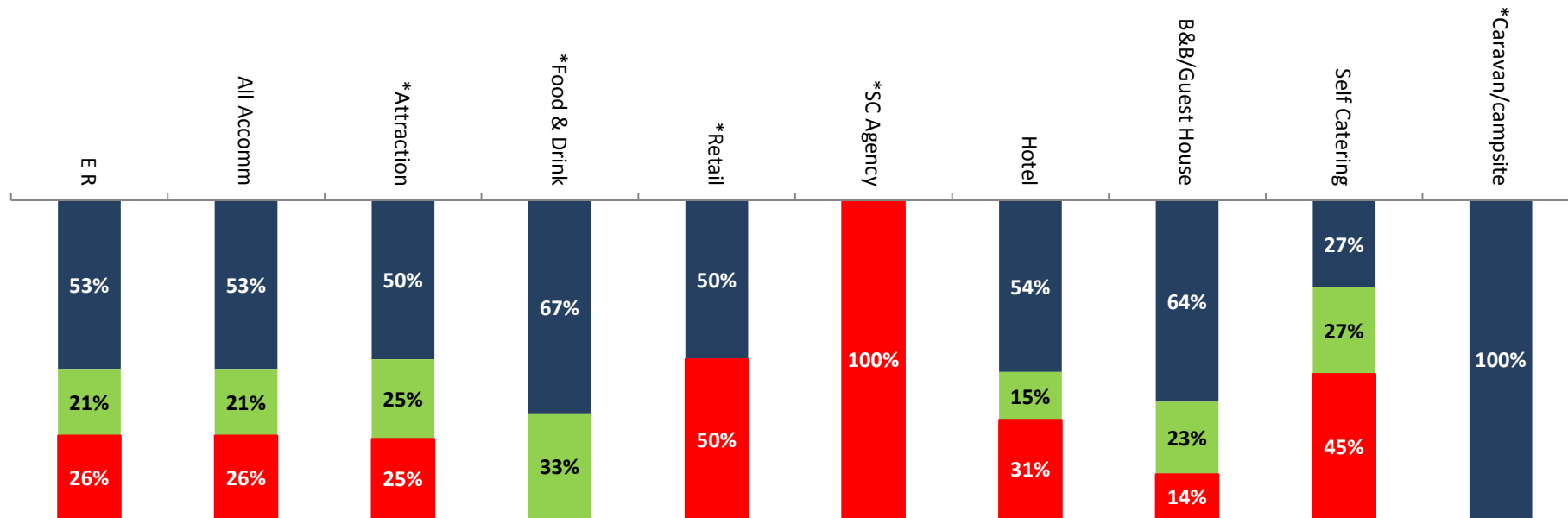
* Sample less than 10

■ Increased ■ Stayed the same ■ Decreased

Visitor numbers	ER	Accomm	*Attraction	*Sports/Activities	*Food & Drink	*Retail	*Travel/Transport	*SC Agency	*Other	Hotel	B&B/Guest House	Self Catering	*Holiday Park	*Caravan/campsite
Increased	56%	58%	60%	-	67%	-	-	-	-	57%	73%	27%	-	100%
Stayed the same	20%	21%	20%	-	33%	-	-	-	-	14%	18%	36%	-	-
Decreased	24%	21%	20%	-	-	100%	-	100%	-	29%	9%	36%	-	-
Base	59	48	5	-	<5	<5	-	<5	-	14	22	11	-	<5

Business Type Performance – Turnover (2014-2013)

74% of all accommodation providers reported increased (53%) or level turnover (21%) for April 2014. 64% of B&B/Guest Houses and 54% of Hotels reported increased turnover for April 2014 compared with the same time last year. 45% of Self Catering operators and 31% of Hotels reported decreased turnover compared with the same time last year.



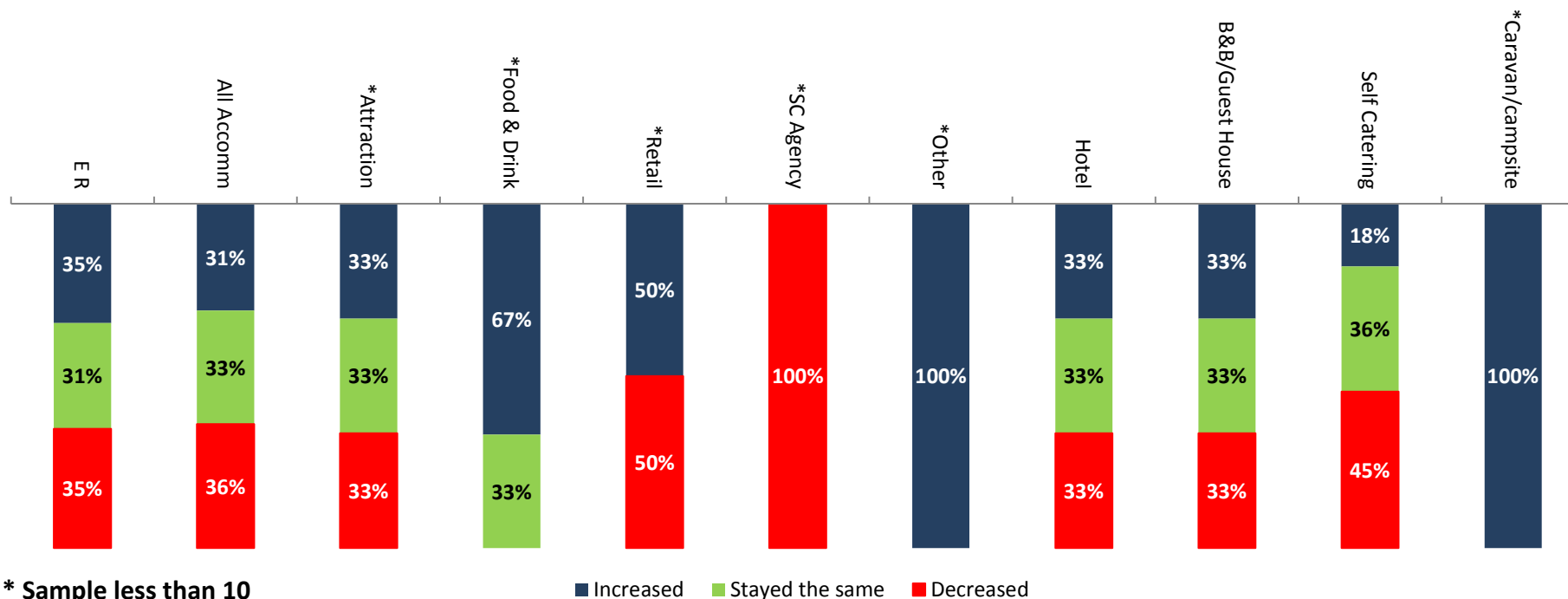
* Sample less than 10

■ Increased ■ Stayed the same ■ Decreased

Turnover	ER	Accomm	*Attraction	*Sports/ Activities	*Food & Drink	*Retail	*Travel/ Transport	*SC Agency	*Other	Hotel	B&B/ Guest House	Self Catering	*Holiday Park	*Caravan/ campsite
Increased	53%	53%	50%	-	67%	50%	-	-	-	54%	64%	27%	-	100%
Stayed the same	21%	21%	25%	-	33%	-	-	-	-	15%	23%	27%	-	-
Decreased	26%	26%	25%	-	-	50%	-	100%	-	31%	14%	45%	-	-
Base	57	47	<5	-	<5	<5	-	<5	-	13	22	11	-	<5

Business Type Performance – Profitability (2014-2013)

64% of all accommodation providers reported increased (31%) or level (33%) profitability for April 2014. 66% of both B&B/Guest Houses and Hotels reported increased or level profitability for April 2014 compared with the same time last year. In contrast, 45% of Self Catering operators reported decreased profitability compared with the April 2013.



Profitability	ER	Accomm	*Attraction	*Sports/ Activities	*Food & Drink	*Retail	*Travel/ Transport	*SC Agency	*Other	Hotel	B&B/ Guest House	Self Catering	*Holiday Park	*Caravan/ campsite
Increased	35%	31%	33%	-	67%	50%	-	-	100%	33%	33%	18%	-	100%
Stayed the same	31%	33%	33%	-	33%	-	-	-	-	33%	33%	36%	-	-
Decreased	35%	36%	33%	-	-	50%	-	100%	-	33%	33%	45%	-	-
Base	55	45	<5	-	<5	<5	-	<5	<5	12	21	11	-	<5

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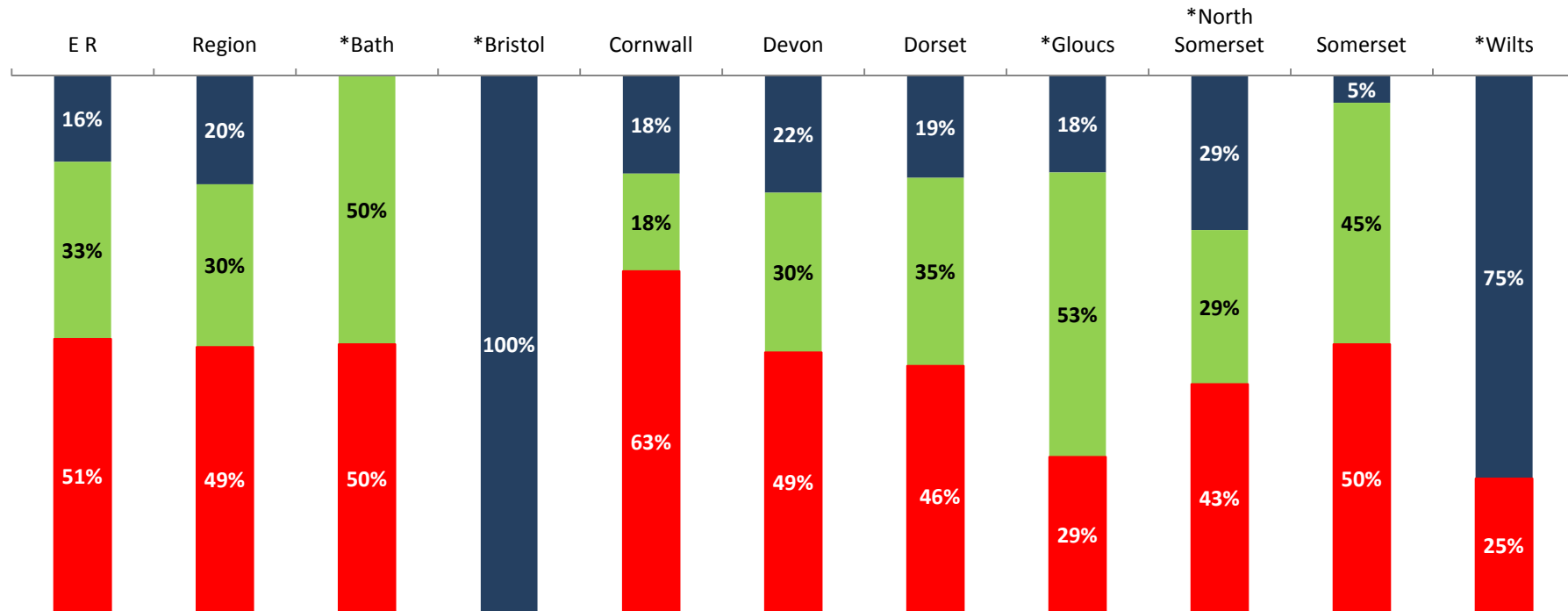
April 2014

Looking Ahead



Area Outlook – Booking Levels May 2014 (2014 v 2013)

51% of English Riviera businesses reported that their booking levels for May 2014 were not looking as good as May 2013, compared with 49% of businesses in each case within the region as a whole and Devon.



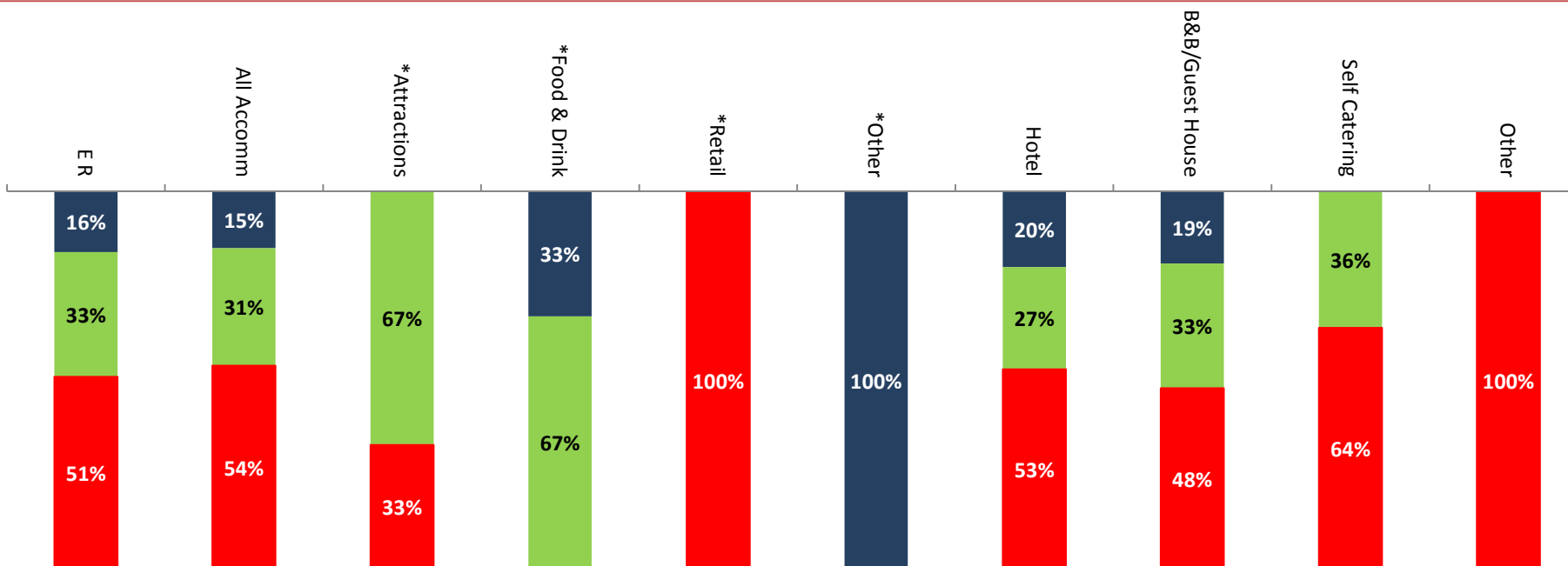
* Sample less than 20

■ Better ■ The same ■ Not as good

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	16%	20%	-	-	100%	18%	22%	19%	18%	29%	5%	75%
The same	33%	30%	50%	-	-	18%	30%	35%	53%	29%	45%	-
Not as good	51%	49%	50%	-	-	63%	49%	46%	29%	43%	50%	25%
Base	57	215	<5	-	<5	49	88	26	17	7	20	<5

Business Type Outlook – Booking Levels May 2014 (2014 v 2013)

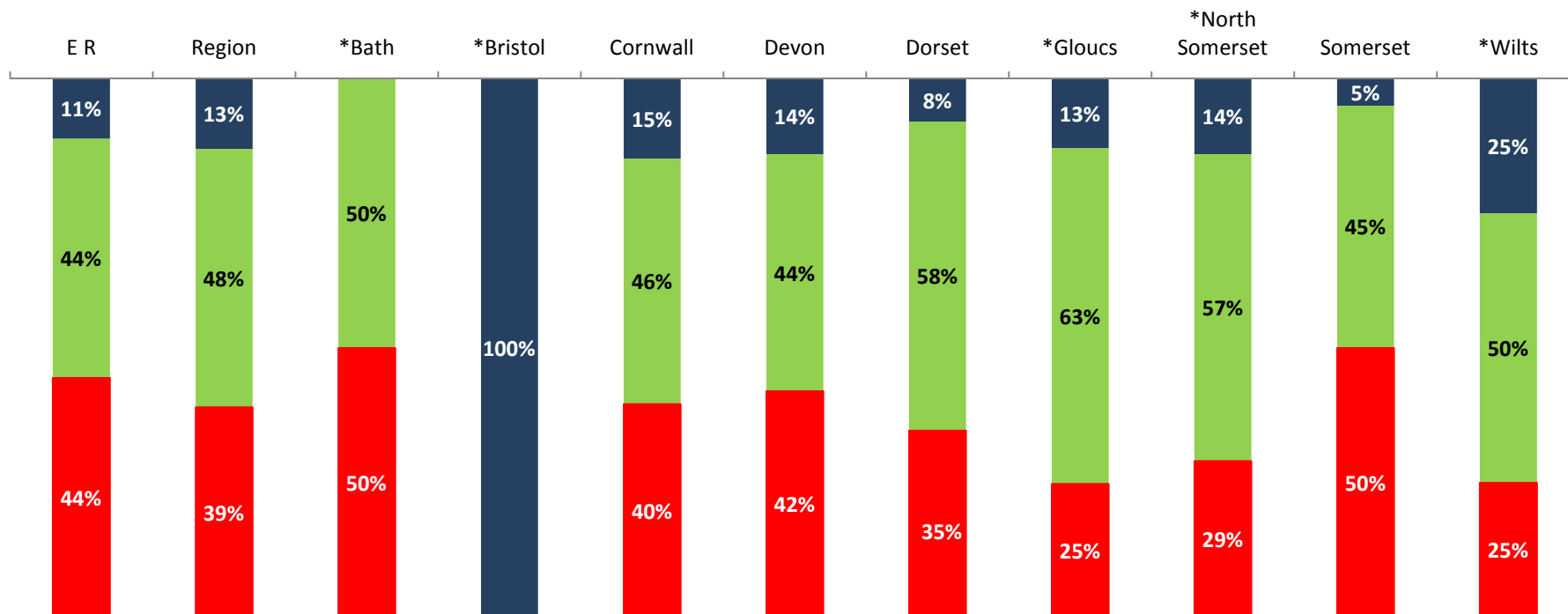
54% of all accommodation providers reported that their May 2014 booking levels were not looking as good as the same time last year. 64% of Self Catering operators, 53% of Hotels and 48% of B&B/Guest Houses reported that their booking levels for May 2014 were not looking as good as May 2013. 52% of B&B/Guest Houses reported that their booking levels for May 2014 were looking better than (19%) or the same as (33%) May 2013.



Booking levels	ER	Accom m	*Attraction	*Sports/Activitie s	*Food & Drink	*Retail	*SC Agency	*Other	Hotel	B&B/ Guest House	Self Catering	*Holiday Park	*Caravan/ campsite	*Other
Better	16%	15%	-	-	33%	-	-	100%	20%	19%	-		-	-
Same	33%	31%	67%	-	67%	-	-	-	27%	33%	36%		-	-
Not as good	51%	54%	33%	-	-	100%	-	-	53%	48%	64%		-	100%
Base	57	48	<5	-	<5	<5	-	<5	15	21	11		-	<5

Area Outlook – Booking Levels Whitsun/May half-term 2014 (2014 v 2013)

55% of all businesses reported that their Whitsun/May half-term booking levels were looking better (11%) or the same as (44%) in 2013 compared with 61% of businesses in the region as a whole and 58% within Devon.



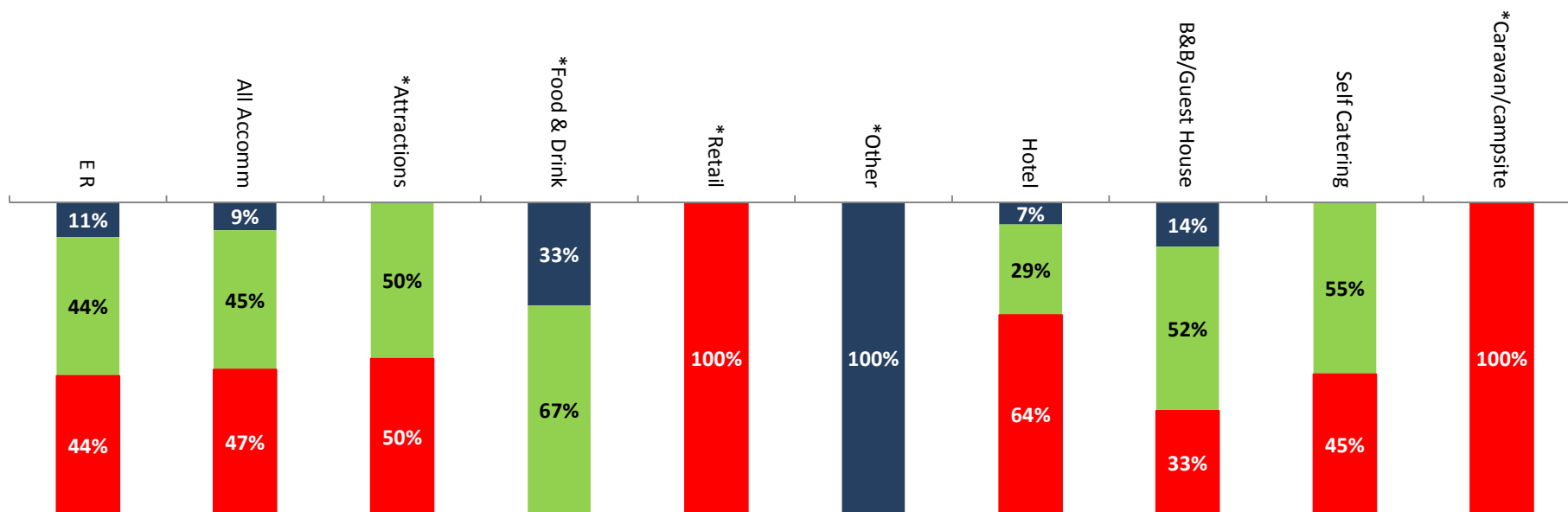
* Sample less than 20

■ Better ■ The same ■ Not as good

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	11%	13%	-	-	100%	15%	14%	8%	13%	14%	5%	25%
The same	44%	48%	50%	-	-	46%	44%	58%	63%	57%	45%	50%
Not as good	44%	39%	50%	-	-	40%	42%	35%	25%	29%	50%	25%
Base	54	209	<5	-	<5	48	84	26	16	7	20	<5

Business Type Outlook – Booking Levels Whitsun/May half-term 2014 (2014 v 2013)

54% of all accommodation providers reported that their Whitsun/May half-term 2014 booking levels were looking better than (9%) or the same as 2013 (45%) whilst 47% said that they were looking worse than 2013. 64% of Hotels reported that their Whitsun/May half-term 2014 booking levels were looking worse than 2013, along with 45% of Self Catering operators. 66% of B&B/Guest Houses said that they were looking better than or level with 2013.



* Sample less than 10

■ Better ■ Same ■ Not as good

Booking levels	ER	Accomm	*Attraction	*Sports/Activities	*Food & Drink	*Retail	*SC Agency	*Other	Hotel	B&B/Guest House	Self Catering	*Holiday Park	*Caravan/campsite
Better	11%	9%	-	-	33%	-	-	100%	7%	14%	-	-	-
Same	44%	45%	50%	-	67%	-	-	-	29%	52%	55%	-	-
Not as good	44%	47%	50%	-	-	100%	-	-	64%	33%	45%	-	100%
Base	54	47	<5	-	<5	<5	-	<5	14	21	11	-	<5

English Riviera Tourism Monitor

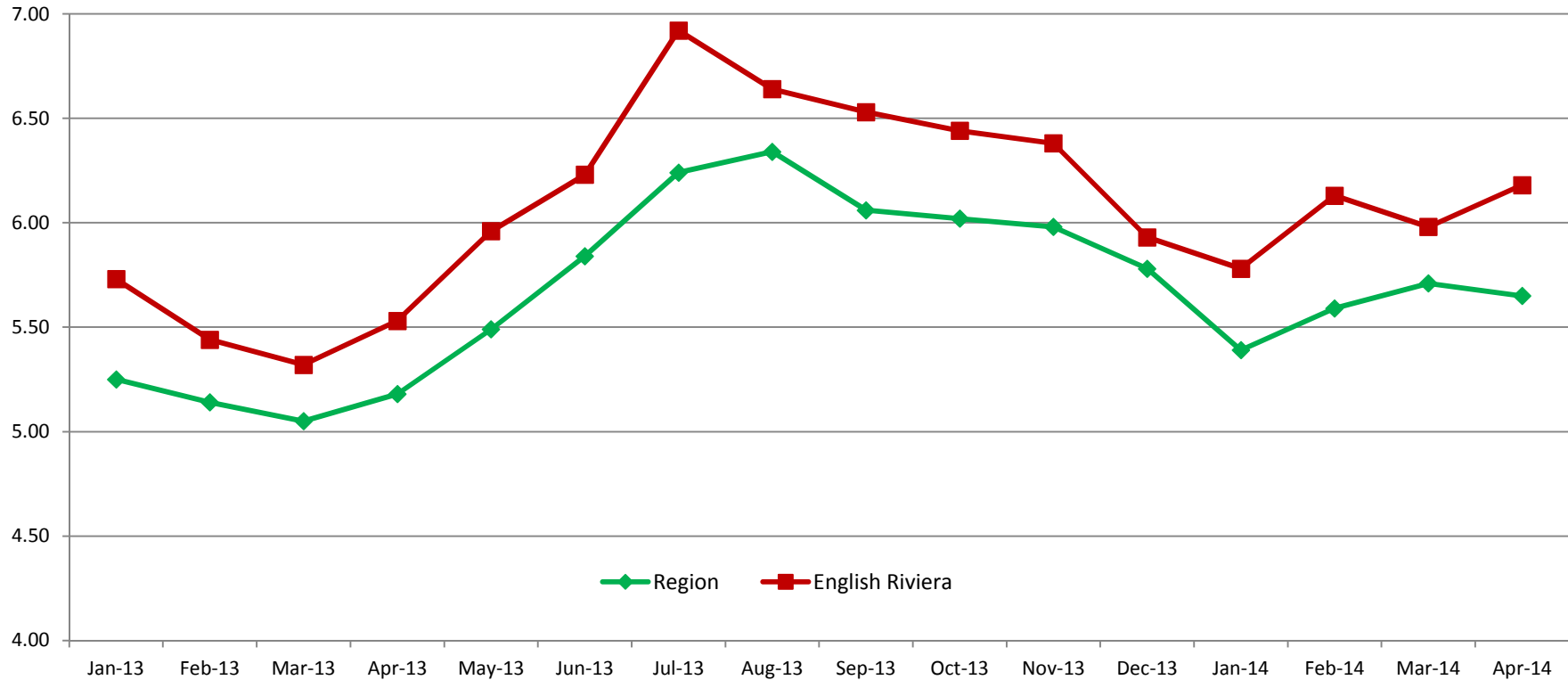
April 2014

Business Optimism



Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.18 for April 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. This compared favourably against the optimism score recorded last month (5.98) and remains higher than the South West regional score for April 2014 of 5.65.



Optimism	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
English Riviera	5.73	5.44	5.32	5.53	5.96	6.23	6.92	6.64	6.53	6.44	6.38	5.93	5.78	6.13	5.98	6.18
Region	5.25	5.14	5.05	5.18	5.49	5.84	6.24	6.34	6.06	6.02	5.98	5.78	5.39	5.59	5.71	5.65

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 44% of all respondents provided additional comments this month with the rise in parking charges, rail line closure and late timing of Easter featuring most heavily this month.

Our early bookings were ahead of normal years until the storms in Feb and the closure of the railway line. After the adverse publicity, enquiries dried up somewhat. We also received some phone calls as late as April asking if Torquay was still flooded!

Footfall for both residents and visitors is drastically down and I would have expected to see more marketing activity by the BID.

June seems to be affected by the World cup as bookings are down on last year during this three week period. People appear to be looking for last minute deals which we have not experienced in the past.

Still very uncertain. Just waiting for more guests. Weather is pretty good, our prices are competitive, but bookings remain sluggish.

The brilliant Easter weather certainly helped, with the last booking taken on Good Friday, so it was all very last minute as the week before we only had 1 room booked.

A late Easter has helped this April and the weather will dictate how good the season will be.

Great weather and a late Easter works wonders. My guests regularly talk about the pavilion being closed and nothing happening to it.

Late Easter has lowered May (one week empty in bookings which hasn't happened before).

Footfall is reduced by Council's reduction of available parking spaces.

Still too many beds in the bay, many hotels are letting their accommodation as self catering which means more competition for us and price war. B Mad Festival and Waste management detrimental to Self Catering.

Level of business coming to Torbay has significantly dropped, very hard to find new guests for season, calls and internet bookings few and far between, currently forward bookings down by substantial amount.

**For further information or to register for the English Riviera Tourism
Monitor please contact info@tswrc.co.uk**

