English Riviera Tourism Monitor

December 2014

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

February 2015

Executive Summary

Compared to December 2013 businesses reported that:

<u>December 2014 Visitor levels:</u>

Increased 27% / Stayed the same 38% / Decreased 35%

Estimated actual change in visitors +3.2%

<u>December 2014 Turnover levels:</u>

Increased 29% / Stayed the same 37% / Decreased 34%

Estimated actual change in turnover +5.1%

<u>December 2014 Profitability was:</u>

Higher 22% / Stayed the same 50% / Decreased 28%

<u>2014 Overall was:</u>

Much better/better 39% / The same 36% / Worse/much worse 25%

<u>January 2015 Outlook is:</u>

Better 27% / Same as last year 33% / Not as good 40%

<u>February 2015 Outlook is:</u>

Better 4% / Same as last year 50% / Not as good 46%

<u>Optimism</u>

Optimism score is 6.09 out of a possible 10

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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.

English Riviera Tourism Monitor

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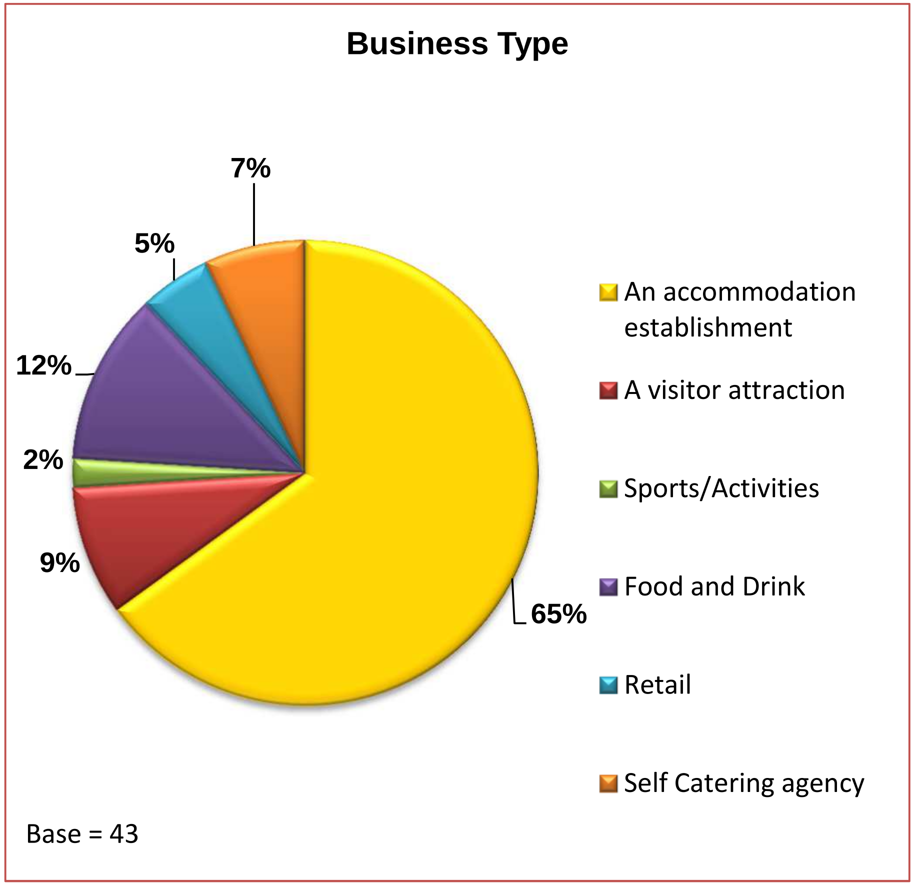
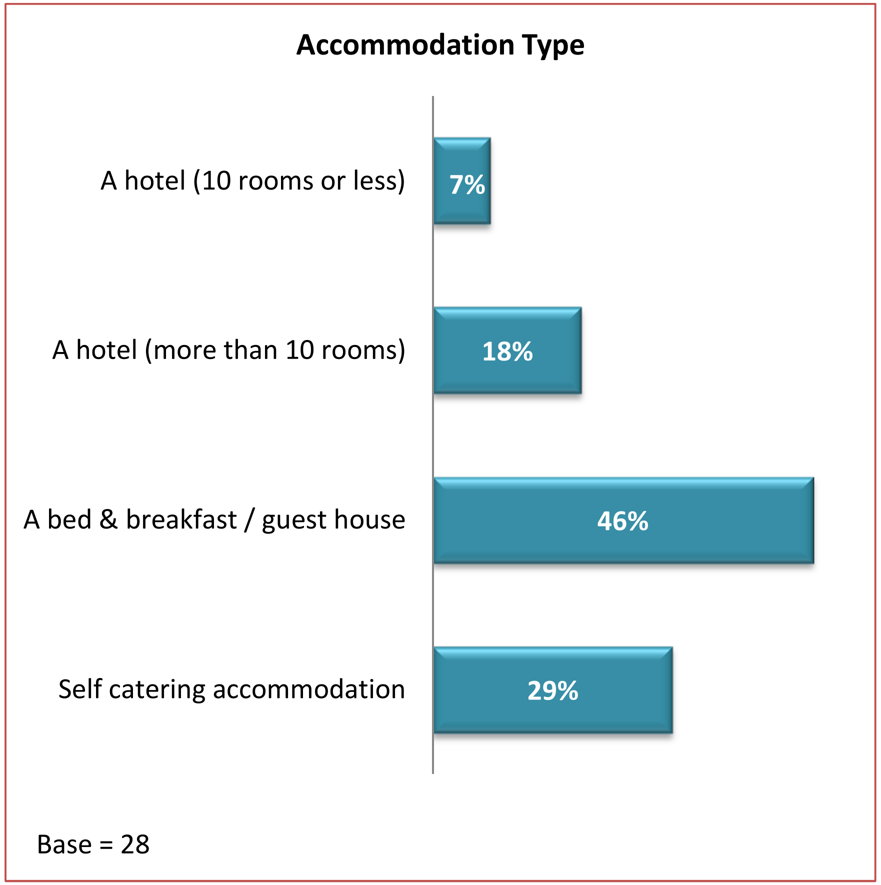
Sample Profile

Business Type

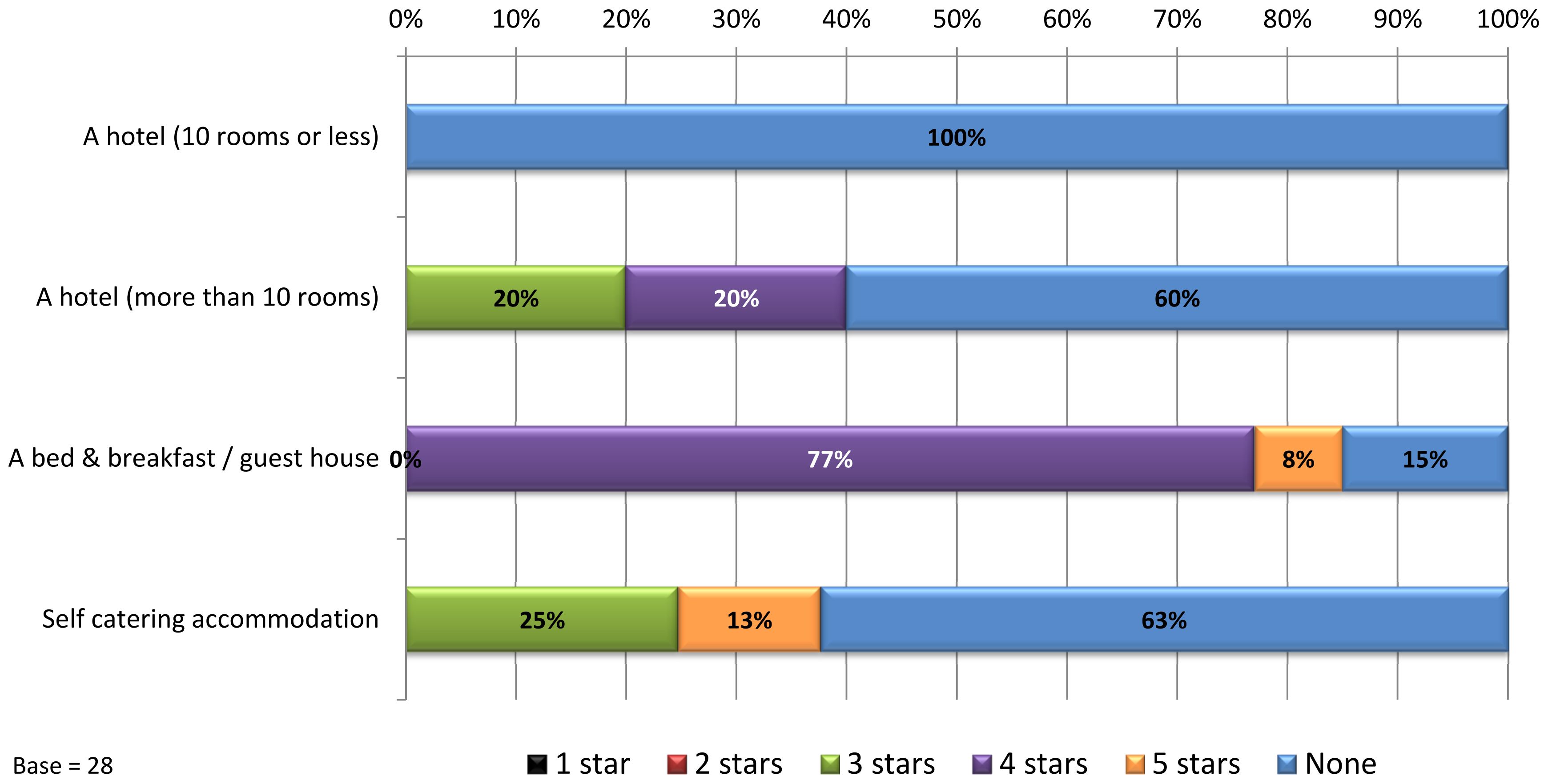




Accommodation providers accounted for 65% of responses with Food & Drink establishments and Visitor Attractions accounting for 12% and 9% respectively.

Serviced accommodation providers accounted for 71% of accommodation responses and Self catering accommodation a further 29%.

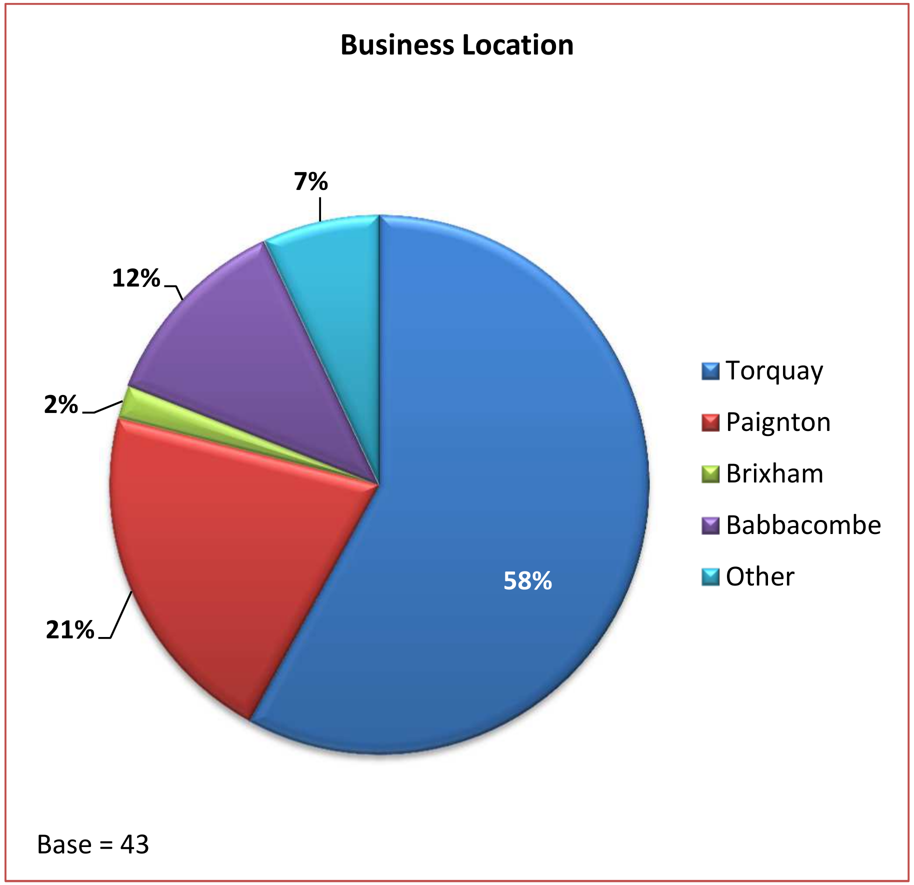
Accommodation Type and Rating

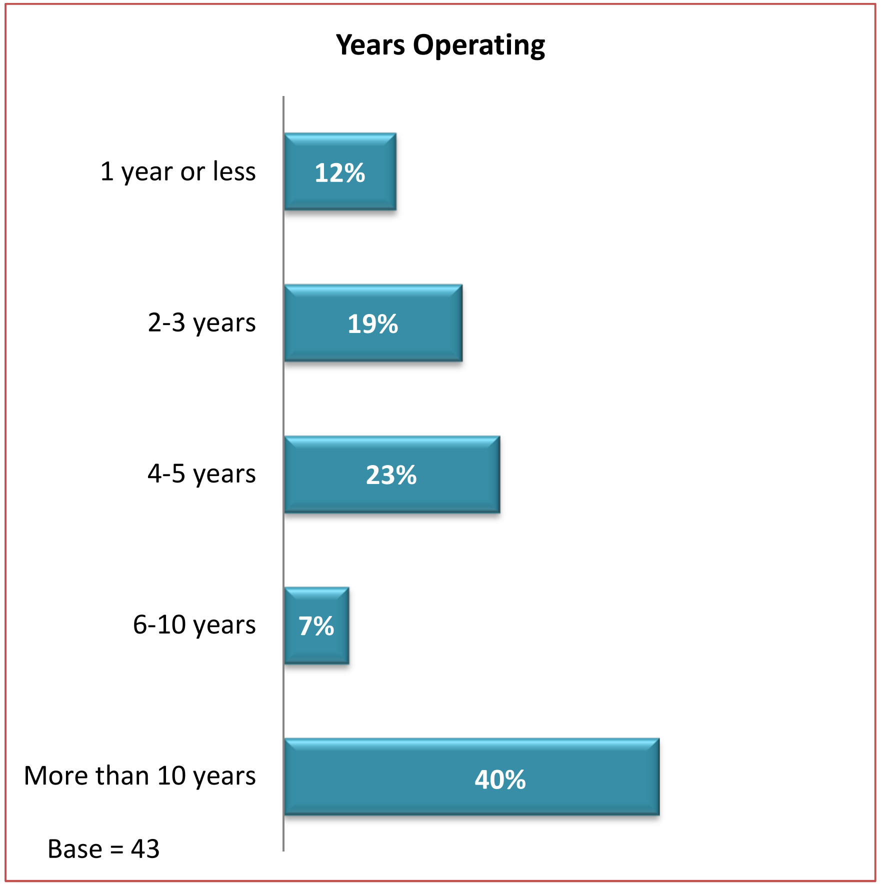


Base = 28

100% of hotels with 10 rooms or less, 63% of Self catering operators and 60% of hotels with more than 10 rooms responding to the survey were not quality graded compared to 15% of B&B/Guest Houses.

Business Location and Years Operating





Torquay businesses accounted for 58% of responses with 21% from Paignton. A further 12% of businesses were from Babbacombe and 2% from Brixham. A further 7% of businesses were based elsewhere in the resort.

47% of businesses have been operating for more than 6 years.

English Riviera Tourism Monitor

December 2014

The Month in Context

December 2014 – The Month in Context

The UK weather

For much of December the weather was from the west, giving milder, wetter spells, particularly in the north and west, interspersed by drier brighter days. The moist, mild Atlantic air gave some notably high temperatures but there were colder spells too from 3rd to 14th and more especially from 27th to 30th. Although it was unsettled for much of the time, rainfall totals were mostly below average in the south and east and in these areas there was plenty of winter sunshine. On Boxing Day there were some snowfalls at lower elevations in Wales in northern England, followed by a notable anti-cyclonic spell toward the New Year. This brought clear skies, hard frosts and the lowest UK temperature readings of the calendar year.

Weather impacts

After a quiet start to the month, there were various impacts from fog, icy roads and strong winds which would be expected at this time of year. There was also some heavy rain and snowfalls at times. Heavy rain affected western Scotland on the 6th and again 9th December. A vigorous Atlantic low pressure system brought wind gusts of up to 70 mph across the north of the UK on 10th December. There was widespread transport disruption in Scotland and around 30,000 homes without power in the Western Isles.

Southern and central Scotland were then affected by snowfalls on the 12th, even to lower levels, while heavy rain again affected western Scotland on the 21st. On Boxing Day an area of precipitation turned to snow as it moved north over the Midlands, with lying snow across Nottinghamshire, Derbyshire and the Pennines. After this, cold air pushed south across the whole country as an area of high pressure developed, giving icy roads and making conditions difficult for motorists. After the high pressure system moved away, milder air pushed in, giving another wet day over western Scotland on the 31st.

Source: Met Office

December 2014 – The Month in Context

The UK Economy

The UK economy has grown more slowly in the past year than previously thought, official figures indicate. Revised figures published during the month showed gross domestic product (GDP) in the third quarter of 2014 was 2.6% higher than in the same period in 2013, down from an earlier estimate of 3%. Also, the UK's current account deficit widened in the third quarter to £27bn. That put the difference between the country's export and import of goods and services at a record 6% of GDP.

David Kern, chief economist at the British Chambers of Commerce, said: "The stark revision in annual growth confirms that the pace of recovery is slowing.“ "The most concerning aspect of these figures is that the current deficit has risen to an unsustainably high level.“ The downward revision in the annual GDP growth rate was due to lower government and business investment than first thought, and higher imports. Despite that, the Office for National Statistics (ONS) confirmed that the UK's GDP still grew by 0.7% in the third quarter of the year. However, the revisions for previous quarters mean the economy is now only 2.9% higher than the previous pre-recession peak. Earlier figures published by the Office for National Statistics (ONS) had suggested that the economy was in fact 3.4% up on that peak.

Other statistics published by the ONS show that in the third quarter of the year, household spending (after the effect of inflation was stripped out) grew by 0.9% or £2.5bn. The main factor was a 2.9% rise in spending on transport compared with the second quarter. Howard Archer, at IHS Global Insight, said: "The latest economic data and surveys are somewhat mixed amid signs that increased global economic uncertainty and weakness in the Eurozone is having some dampening impact on business confidence and investment. This may well be reinforced over the coming months by heightened political uncertainty ahead of the May 2015 general election. However, retail sales have been very strong, which bodes well for consumer spending in the fourth quarter.“ Martin Beck, at the EY Item Club, suggested that the economy could grow faster next year than this. "The plunge in oil prices promises to provide the economy with renewed momentum, by improving household purchasing power and boosting global growth," he said. "The likelihood that disinflationary pressures will keep interest rates unchanged through 2015 should provide another spur to growth."

Source: The BBC

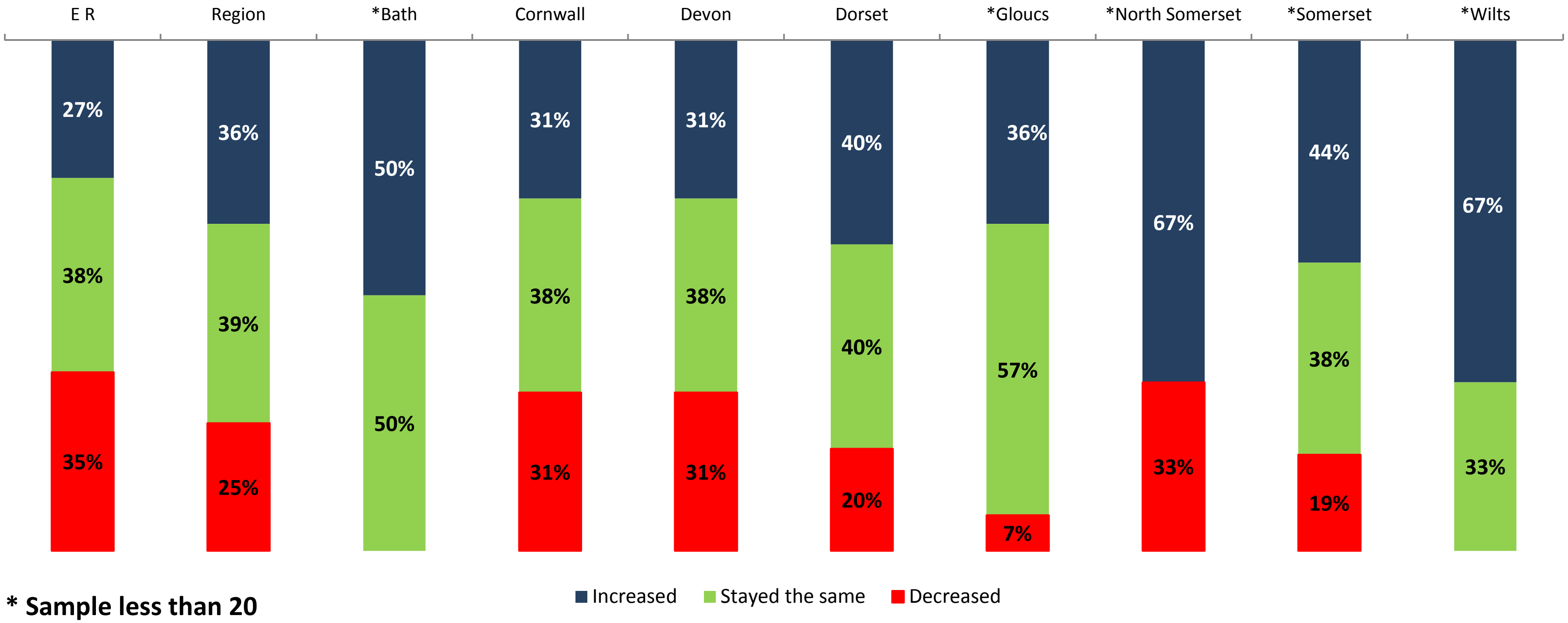
English Riviera Tourism Monitor

December 2014

Performance

Performance – Visitor Numbers (2014-2013)

65% of English Riviera businesses reported that their visitor numbers had increased (27%) or stayed the same (38%) compared with December 2013 – a lower proportion when compared against the region as a whole during the same period (75%). 35% of businesses indicated that their visitor numbers had decreased compared with the same time last year (25% regionally).



*** Sample less than 20**

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	27%	36%	50%	-	-	31%	31%	40%	36%	67%	44%	67%
Stayed the same	38%	39%	50%	-	-	38%	38%	40%	57%	-	38%	33%
Decreased	35%	25%	-	-	-	31%	31%	20%	7%	33%	19%	-
Base	37	168	<5	-	-	42	65	20	14	<5	16	<5

Performance – Estimated occupancy levels December 2014

The slides to follow show the estimated occupancy for December 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

December-14	% RM OCCUPANCY	SAMPLE
English Riviera	34.88%	12
All hotels	37.89%	5
Hotel 10 rooms or less	25.64%	<5
Hotel more than 10 rooms	39.73%	<5
B&B	13.97%	<5
Guest House	24.92%	<5
Torquay	28.55%	7
Paignton	46.61%	<5
Brixham	26.79%	<5
Babbacombe	0.00%	0
**Cockington	0.00%	0
Other English Riviera	0.00%	<5
Devon	33.68%	19
South West	43.93%	55

Cockington data added to Torquay due to small sample

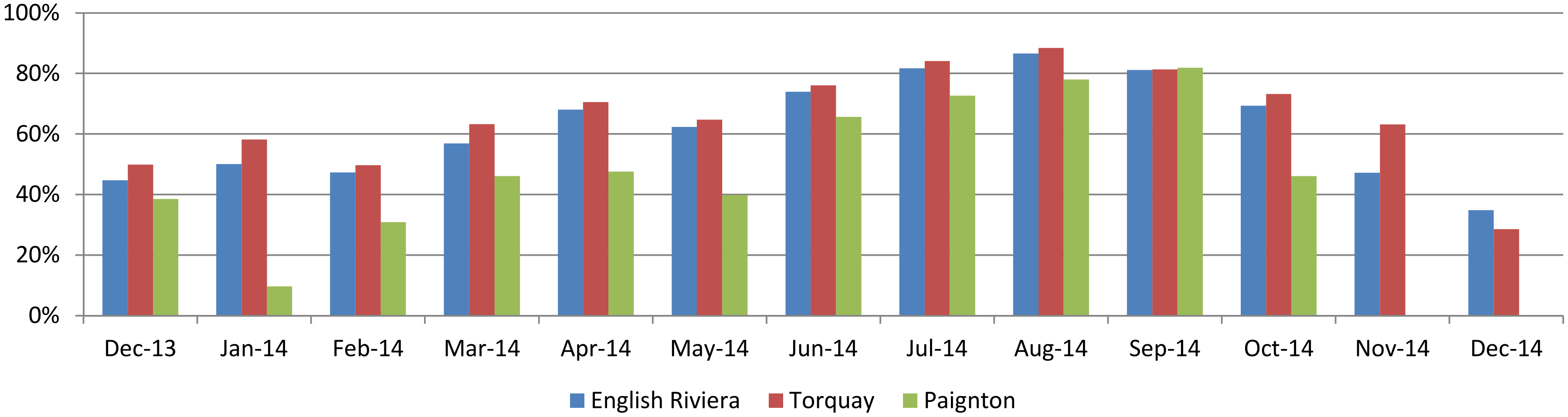
English Riviera serviced room occupancy was calculated at 34.88% for December 2014 compared with an average of 43.93% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for December 2014 was calculated at 38.76% compared with 25.89% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY

December-14	% UNIT OCC	SAMPLE
English Riviera	38.76%	8
Self-catering accommodation	38.76%	8
Holiday Park	0.00%	0
Torquay	20.55%	<5
Paignton	61.45%	<5
Brixham	0.00%	0
Babbacombe	0.00%	<5
Cockington	0.00%	0
Other English Riviera	0.00%	<5
Devon	35.67%	18
South West	25.89%	52

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



SERVICED ROOM OCCUPANCY	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14
English Riviera	44.72%	50.07%	47.32%	56.90%	68.04%	62.36%	73.97%	81.71%	86.59%	81.14%	69.30%	47.17%	34.88%
Torquay	49.88%	58.22%	49.69%	63.22%	70.50%	64.72%	76.09%	84.07%	88.44%	81.33%	73.21%	63.19%	28.55%
Paignton	38.51%	9.63%	30.84%	46.09%	47.56%	39.8%	65.65%	72.63%	78.00%	81.88%	46.13%	*	*
Brixham	*	*	*	*	*	*	*	*	*	*	*	*	*
Babbacombe	*	*	*	*	*	*	*	*	*	*	*	*	*
Cockington	*	*	*	*	*	*	*	*	*	*	*	*	*
Other English Riviera	*	*	*	*	*	*	*	*	*	*	*	*	*

*** Sample size less than 5**

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

During the month of December 2014 English Riviera serviced occupancy was lower than all comparison areas with the exception of Devon and Somerset.

Key comparisons;
South West – ER performance was higher than the regional average during all months except March, May, June, November and December 2014.
Devon – ER performance was higher than Devon during all months except June and November 2014.

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14	2014 overall
South West	46.15%	47.12%	57.12%	63.21%	62.73%	75.60%	81.27%	82.17%	75.79%	67.65%	60.33%	43.93%	63.59%
Former Avon	*	*	*	*	*	*	*	*	*	*	*	72.40%	*
Cornwall	*	36.61%	48.59%	50.82%	57.60%	67.16%	86.28%	89.10%	36.31%	72.19%	*	44.24%	*
Devon	47.35%	44.94%	54.86%	66.40%	61.49%	73.97%	80.49%	83.29%	80.25%	67.70%	60.25%	33.68%	62.89%
English Riviera	**50.07%**	**47.32%**	**56.90%**	**68.04%**	**62.36%**	**73.97%**	**81.71%**	**86.59%**	**81.14%**	**69.30%**	**47.17%**	**34.88%**	**63.29%**
Dorset	54.58%	27.23%	*	44.59%	52.09%	*	73.06%	*	71.12%	*	*	*	*
Gloucestershire	*	*	77.59%	41.92%	61.65%	*	71.38%	*	*	*	*	49.93%	*
Somerset	32.48%	46.42%	37.22%	65.40%	70.42%	55.84%	67.91%	71.51%	72.08%	*	*	17.10%	*
Wiltshire	56.85%	59.82%	*	*	60.50%	*	*	68.14%	*	*	*	*	*

*** Sample size less than 5**

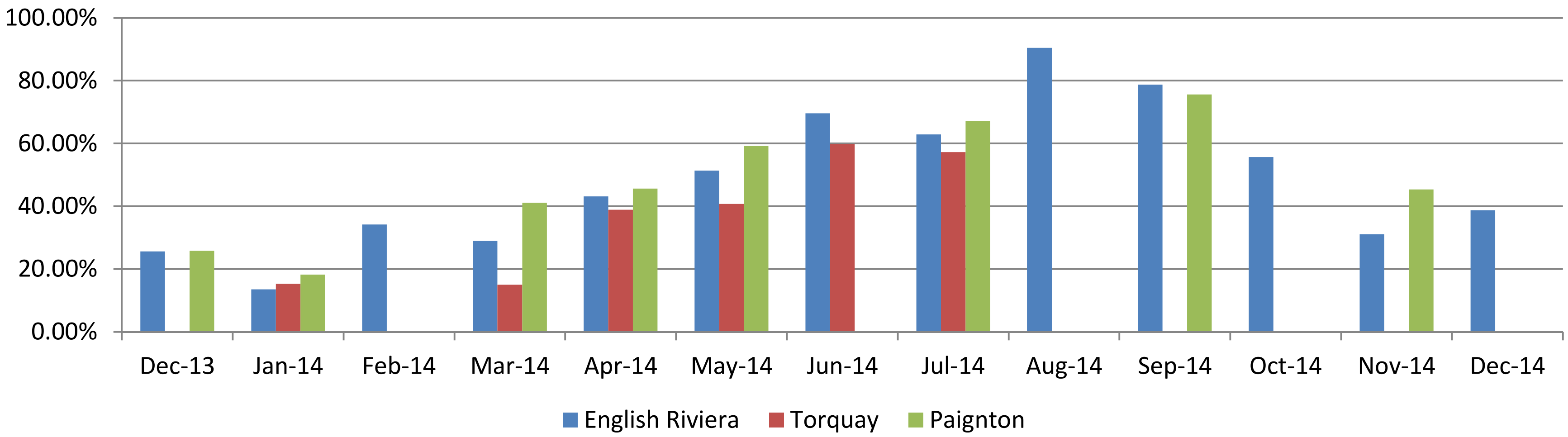
Performance – Estimated serviced accommodation occupancy levels 2014 by type

Key comparisons;
All ER Hotels – Higher than the regional average during all months except March, June and December 2014.
ER Hotels (10 rooms or less) – Lower than the regional during all months except July 2014.
ER Hotels (more than 10 rooms) - Higher than the regional average during all months except February and March 2014.
ER B&B/Guest House – Lower than the regional average in all months except July and August 2014.

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14	2014 overall
All ER hotels	**55.42%**	**52.05%**	**61.01%**	**71.96%**	**67.17%**	**77.30%**	**84.54%**	**88.28%**	**84.53%**	**73.76%**	**47.51%**	**37.89%**	**66.79%**
All SW hotels	50.76%	51.93%	62.15%	67.71%	67.08%	77.84%	84.07%	83.08%	77.68%	71.71%	*	45.92%	66.81%
ER Hotel 10 rooms or less	**12.36%**	**14.78%**	*	*	**21.41%**	**25.30%**	**70.39%**	**60.72%**	**54.10%**	*	*	*	*
SW Hotel 10 rooms or less	19.22%	26.75%	*	29.78%	38.48%	39.30%	69.51%	70.31%	61.72%	35.13%	33.93%	24.12%	*
ER Hotel more than 10 rooms	**57.54%**	**54.40%**	**61.01%**	**73.42%**	**68.62%**	**83.44%**	**85.26%**	**91.19%**	**84.53%**	**75.35%**	*	*	*
SW Hotel more than 10 rooms	52.93%	56.10%	62.54%	69.50%	68.17%	81.33%	84.68%	83.84%	78.59%	72.85%	62.59%	49.07%	68.51%
ER B&B/Guest House	**8.34%**	**17.56%**	**20.79%**	**31.82%**	**37.21%**	**53.16%**	**69.42%**	**80.25%**	**65.06%**	**38.47%**	**35.73%**	**20.00%**	**39.82%**
SW B&B/Guest House	23.00%	26.78%	23.34%	35.27%	45.25%	65.03%	68.24%	77.99%	66.36%	40.47%	47.18%	38.33%	46.44%

*** Sample size less than 5**

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



SELF-CATERING UNIT OCCUPANCY	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14
All ER Self-catering	25.64%	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%	62.92%	90.48%	78.71%	55.67%	31.03%	38.76%
Torquay	*	15.30%	*	15.00%	38.92%	40.78%	59.87%	57.30%	*	*	*	*	*
Paignton	25.76%	18.22%	*	41.09%	45.67%	59.19%	*	67.16%	*	75.63%	*	45.32%	*
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 December 2014 English Riviera self-catering unit occupancy was higher than all comparative areas with the exception of Somerset.

Key comparisons;
South West – ER performance was higher than the regional average during February, May, June, August, September, October and December 2014.
Cornwall – ER performance was higher than Cornwall during February, May, June, August, September and December 2014.
Devon – ER performance was higher than Devon during January, June, August, September, November and December 2014.

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14	2014 overall
South West	16.89%	12.88%	30.19%	61.36%	39.19%	47.15%	74.57%	87.78%	55.37%	52.74%	31.17%	25.89%	44.60%
Former Avon	*	*	*	*	*	*	*	*	*	*	*	*	
Cornwall	15.25%	12.77%	36.89%	66.71%	28.26%	63.33%	70.68%	87.70%	48.20%	*	34.21%	20.72%	
Devon	12.76%	35.44%	33.21%	58.18%	51.69%	63.96%	80.33%	87.70%	67.21%	57.68%	30.63%	35.67%	51.20%
English Riviera	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**	**90.48%**	**78.71%**	**55.67%**	**31.03%**	**38.76%**	**49.87%**
Dorset	19.71%	7.40%	13.98%	48.33%	63.30%	14.01%	68.96%	97.03%	71.85%	45.63%	19.27%	10.24%	39.98%
Gloucestershire	*	7.06%	*	88.79%	*	*	*	*	*	*	*	*	
Somerset	19.23%	4.88%	17.89%	54.98%	31.82%	56.92%	54.20%	80.12%	53.62%	67.42%	28.25%	39.17%	42.37%
Wiltshire	*	0.00%	*	*	*	*	*	*	*	*	*	*	

*** Sample size less than 5**

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

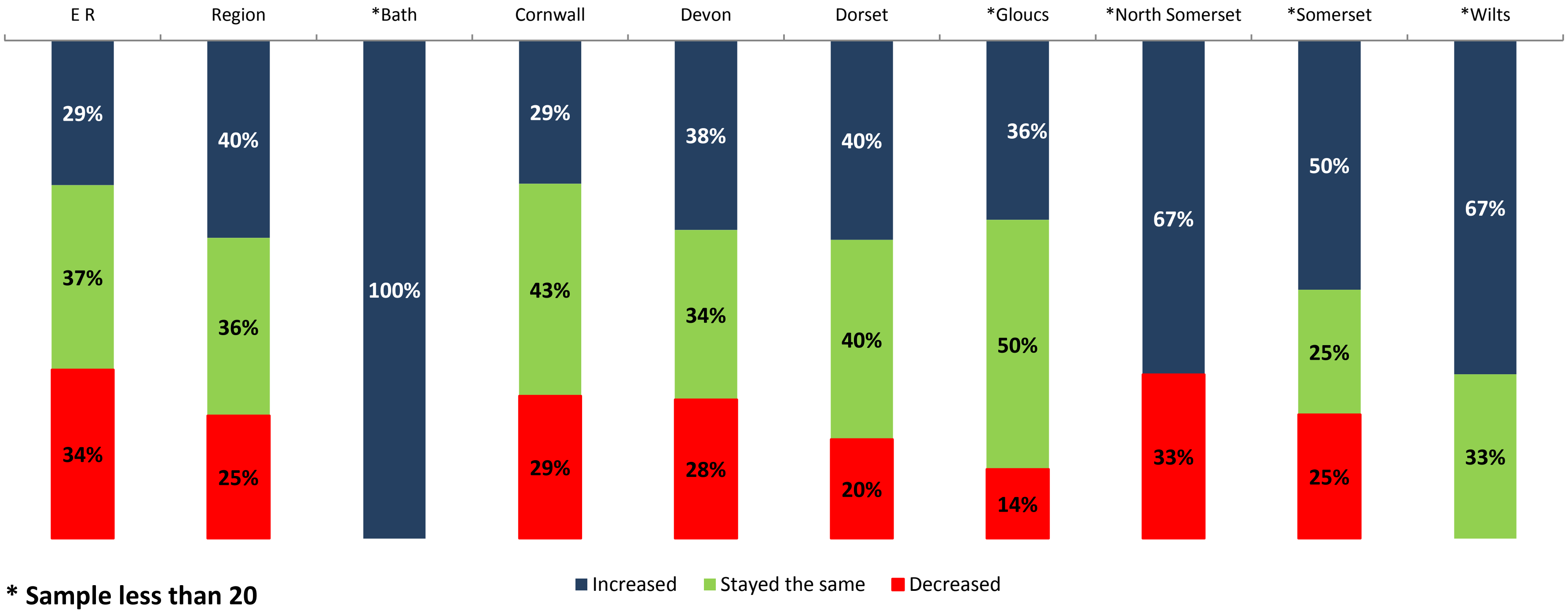
Key comparisons;
All ER Self-catering – Higher than the regional average during February, May, June, August, September, October and December 2014.
ER Self-catering (not including Holiday Parks) – Higher than the regional average in all months except January, April, July, November and December 2014.

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14	2014 overall
All ER Self-catering	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**	**90.48%**	**78.71%**	**55.67%**	**31.03%**	**38.76%**	**49.87%**
All SW Self-catering	16.89%	21.04%	30.19%	61.36%	39.19%	47.15%	74.57%	87.78%	55.37%	52.74%	31.17%	25.89%	45.28%
ER Self-catering	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**	**95.94%**	**78.71%**	**55.67%**	**31.03%**	**38.76%**	**50.33%**
SW Self-catering	16.89%	21.04%	26.18%	46.64%	48.72%	58.10%	78.15%	85.37%	56.80%	52.38%	34.93%	29.46%	46.22%
ER Holiday Park	*	*	*	*	*	*	*	*	*	*	*	*	*
SW Holiday Park	*	*	32.47%	66.33%	28.41%	*	56.51%	*	*	*	*	*	*

*** Sample size less than 5**

Performance – Turnover (2014-2013)

66% of English Riviera businesses reported increased (29%) or level turnover (37%) during December 2014 compared with December 2013, again a lower proportion when compared with the region as a whole during the same period (76%). 34% of English Riviera businesses reported decreased turnover during December 2014 (25% regionally).



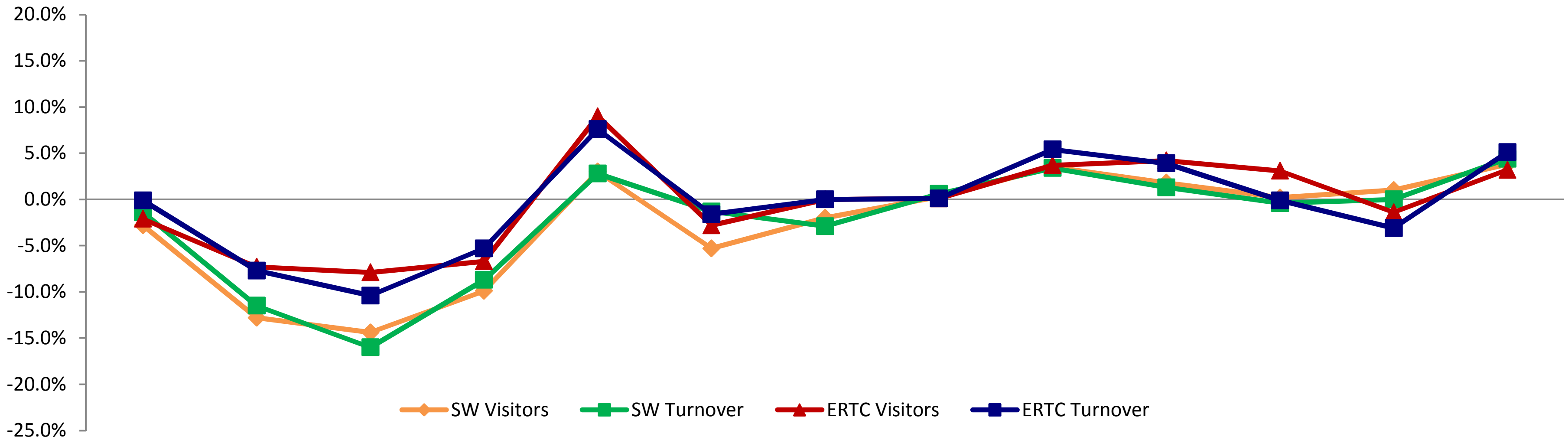
*** Sample less than 20**

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	29%	40%	100%	-	-	29%	38%	40%	36%	67%	50%	67%
Stayed the same	37%	36%	-	-	-	43%	34%	40%	50%	-	25%	33%
Decreased	34%	25%	-	-	-	29%	28%	20%	14%	33%	25%	-
Base	38	169	5	-	-	42	65	20	14	<5	16	<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 December 2014 English Riviera businesses reported an increase of +3.2% in terms of visitors along with an increase in turnover of +5.1% compared with December 2013 and compared with +3.8% and +4.4% in terms of visitors and turnover respectively during the same period for the region as a whole.

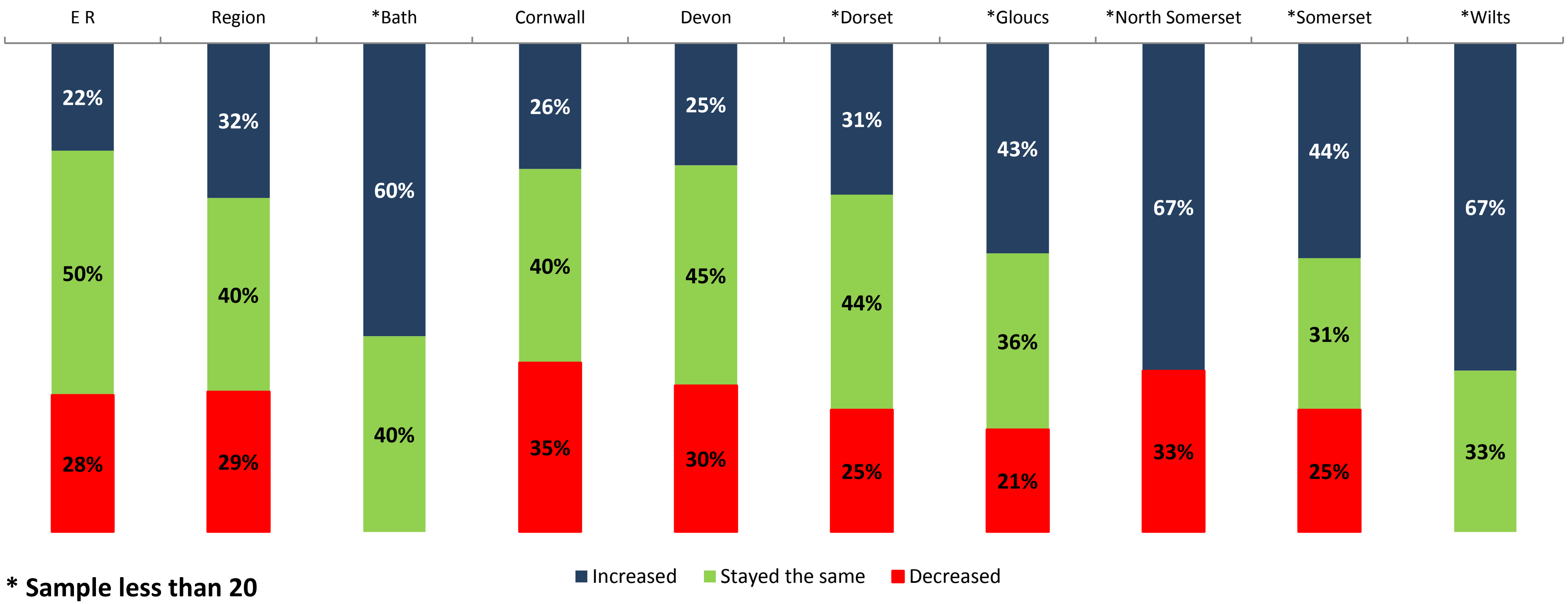
ERTC	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14
Visitors	-2.1%	-7.3%	-7.9%	-6.7%	9.0%	-2.8%	0.0%	0.1%	3.7%	4.2%	3.1%	-1.4%	3.2%
Turnover	-0.1%	-7.7%	-10.4%	-5.3%	7.6%	-1.6%	0.0%	0.1%	5.4%	3.9%	-0.1%	-3.1%	5.1%



Region	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14
Visitors	-2.8%	-12.8%	-14.4%	-9.9%	3.0%	-5.3%	-2.0%	0.3%	3.5%	1.8%	0.2%	1.0%	3.8%
Turnover	-1.4%	-11.5%	-16.0%	-8.7%	2.8%	-1.3%	-2.9%	0.6%	3.4%	1.3%	-0.4%	0.0%	4.4%

Performance – Profitability (2014-2013)

72% of all English Riviera businesses reported increased (22%) or level profitability (50%) for the month, the same proportion as the SW region as a whole during the same period. 28% of businesses reported their profitability as being lower than during December 2013 (29% of SW businesses).



*** Sample less than 20**

Profitability	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	22%	32%	60%	-	-	26%	25%	31%	43%	67%	44%	67%
Stayed the same	50%	40%	40%	-	-	40%	45%	44%	36%	-	31%	33%
Decreased	28%	29%	-	-	-	35%	30%	25%	21%	33%	25%	-
Base	36	161	5	-	-	43	60	16	14	<5	16	<5

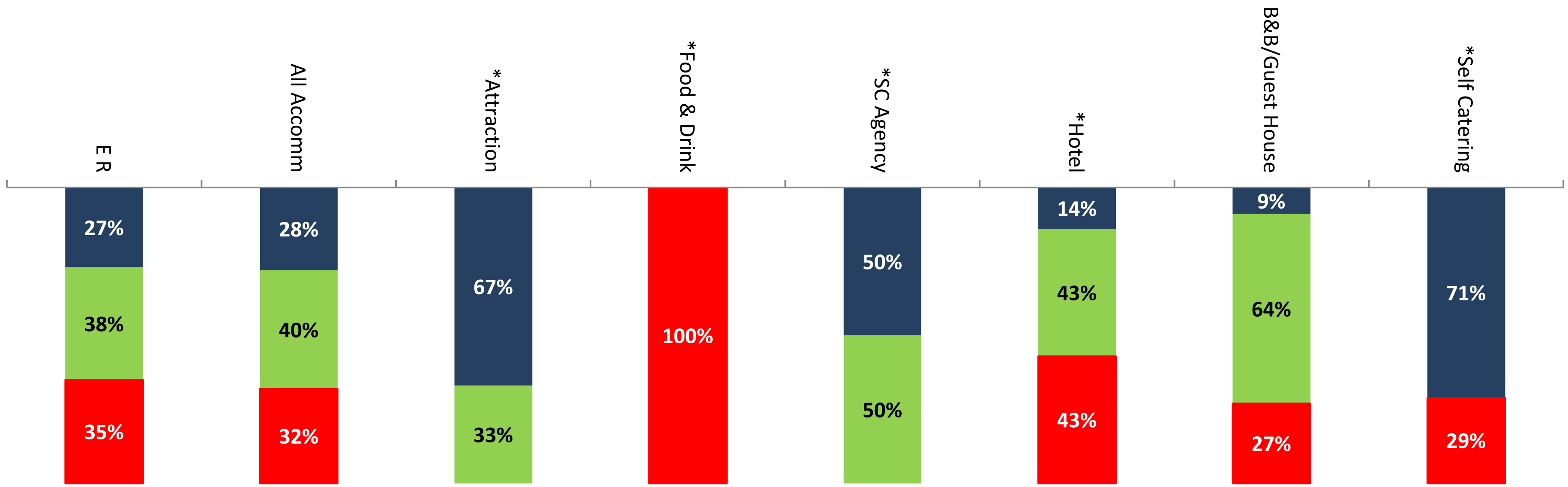
English Riviera Tourism Monitor

December 2014

Business Type Performance

Business Type Performance – Visitor numbers (2014-2013)

68% of all accommodation providers reported increased (28%) or level (40%) visitor numbers for December 2014. 73% of B&B/Guest Houses reported increased (9%) or level visitor numbers (64%) for December 2014 compared with the same time last year whilst 27% reported decreased visitor numbers.

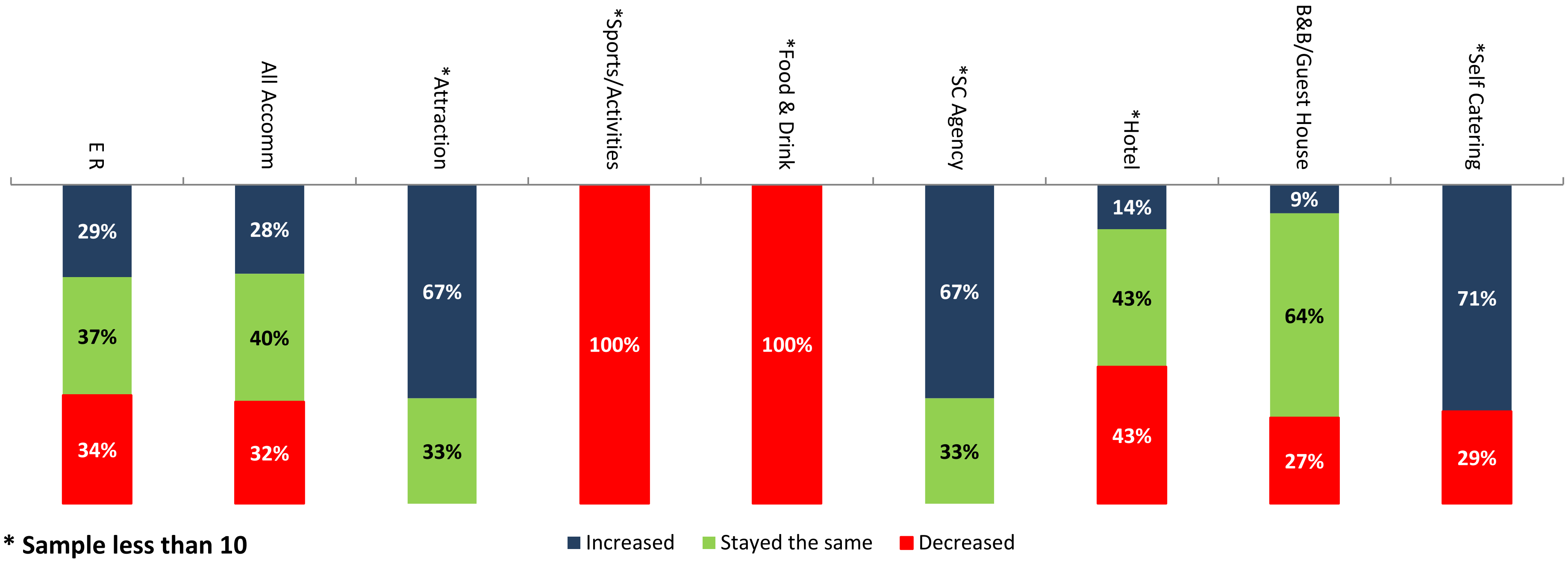


*** Sample less than 10**

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	27%	28%	67%	-	-	-	-	50%	-	14%	9%	71%	-	-
Stayed the same	38%	40%	33%	-	-	100%	-	50%	-	43%	64%	-	-	-
Decreased	35%	32%	-	100%	100%	-	-	-	-	43%	27%	29%	-	-
Base	37	25	<5	<5	<5	<5	-	<5	-	7	11	7	-	-

Business Type Performance – Turnover (2014-2013)

68% of all accommodation providers reported increased (28%) or level turnover (40%) for December 2014. 73% of B&B/Guest Houses reported increased (9%) or level turnover (64%) for December 2014 compared with the same time last year whilst 27% reported decreased turnover.

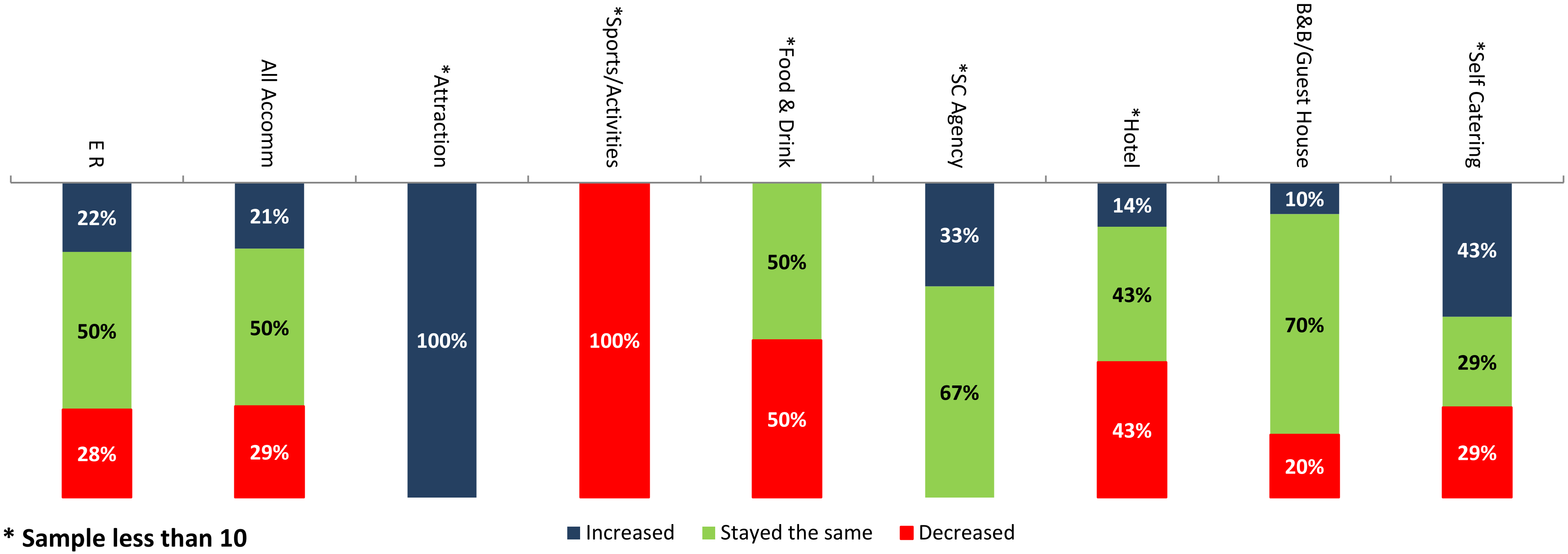


*** Sample less than 10**

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	29%	28%	67%	-	-	-	-	67%	-	14%	9%	71%	-	-
Stayed the same	37%	40%	33%	-	-	100%	-	33%	-	43%	64%	-	-	-
Decreased	34%	32%	-	100%	100%	-	-	-	-	43%	27%	29%	-	-
Base	38	25	<5	<5	<5	<5	-	<5	-	7	11	7	-	-

Business Type Performance – Profitability (2014-2013)

71% of all accommodation providers reported increased (21%) or level (50%) profitability for December 2014. 80% of B&B/Guest Houses reported increased (10%) or level profitability (70%) for December 2014 compared with the same time last year whilst 20% reported decreased profitability.



*** Sample less than 10**

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	22%	21%	100%	-	-	-	-	33%	-	14%	10%	43%	-	-
Stayed the same	50%	50%	-	-	50%	100%	-	67%	-	43%	70%	29%	-	-
Decreased	28%	29%	-	100%	50%	-	-	-	-	43%	20%	29%	-	-
Base	36	24	<5	<5	<5	<5	-	<5	-	7	10	7	-	-

English Riviera Tourism Monitor

December 2014

2014 Overall

Business Type Performance – Year overall (2014-2013)

39% of all English Riviera businesses considered 2014 to have been much better (6%) or better (33%) than 2013, a slightly lower proportion than the region as a whole (43%).

36% of businesses felt it had been the same as 2013 (25% region as a whole), whilst 25% felt it had been worse than 2013 and compared with 31% of businesses for the region as a whole.

56% of all accommodation establishments felt 2014 had been better or much better in terms of overall performance compared with 2013 including 55% of B&B's/Guest Houses.

A further 32% of all accommodation establishments including 36% of B&B/Guest Houses felt it had been the same. Just 12% of all accommodation establishments felt 2014 had been worse than 2013 including 9% of B&B/Guest Houses.

2014 Year Performance	Region	ER	Accomm	*Attraction	*Sports/ Activities	*Food & Drink	*Retail	*SC Agency	*Other	*Hotel	B&B/	*Self Catering	*Holiday Park
Much better	9%	6%	8%	-	-	-	-	-	-	17%	9%	-	-
Better	34%	33%	48%	-	-	-	-	-	-	50%	46%	50%	-
The same	25%	36%	32%	67%	-	25%	50%	100%	-	17%	36%	38%	-
Worse	26%	25%	12%	33%	100%	75%	50%	-	-	17%	9%	13%	-
Much worse	5%	-	-	-	-	-	-	-	-	-	-	-	-
Base	172	36	25	<5	<5	<5	<5	<5	-	6	11	8	-

*** Sample less than 10**

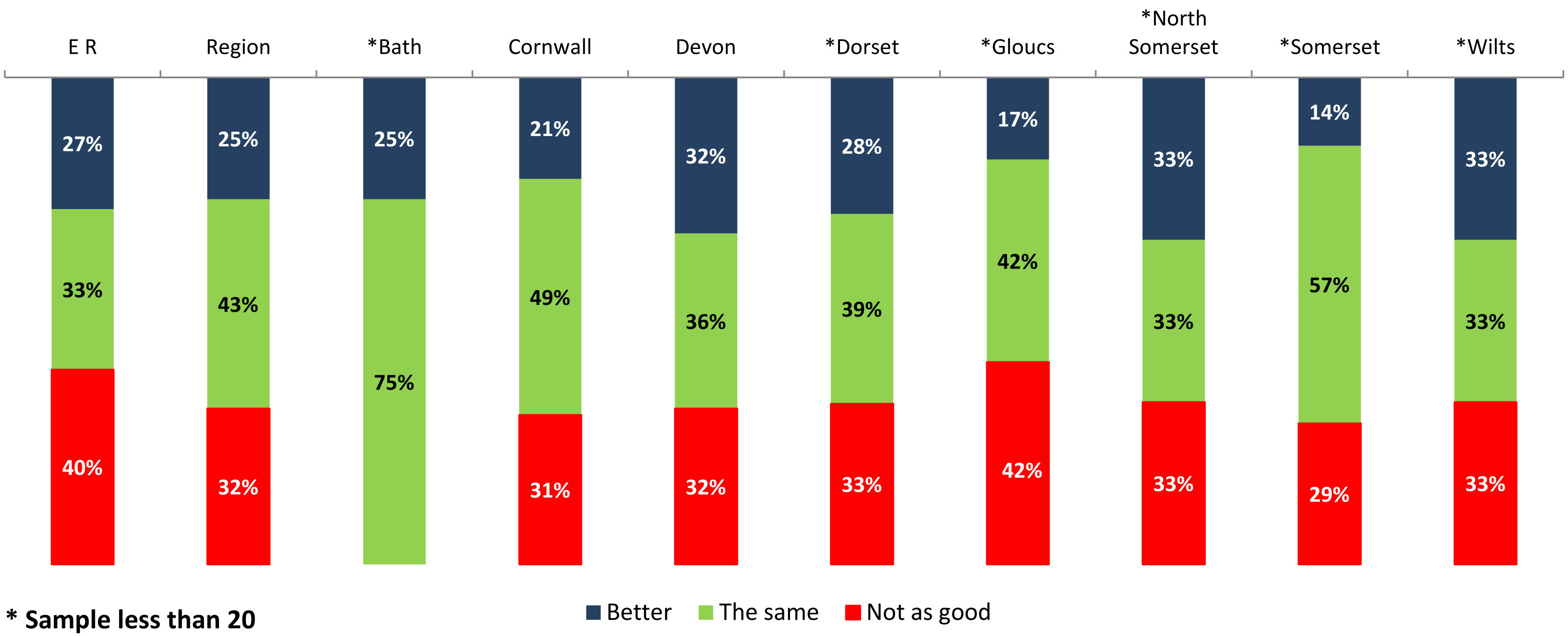
English Riviera Tourism Monitor

December 2014

Looking Ahead

Area Outlook – Booking Levels January 2015 (2015 v 2014)

60% of English Riviera businesses reported that their booking levels for January 2015 were looking better than (27%) or the same as (33%) January 2014, compared with 68% of businesses in each case within the region as a whole and in Devon. 40% of businesses reported that their January 2015 booking levels were looking worse than in 2014 compared with 32% of businesses in each case in the region as a whole and in Devon.

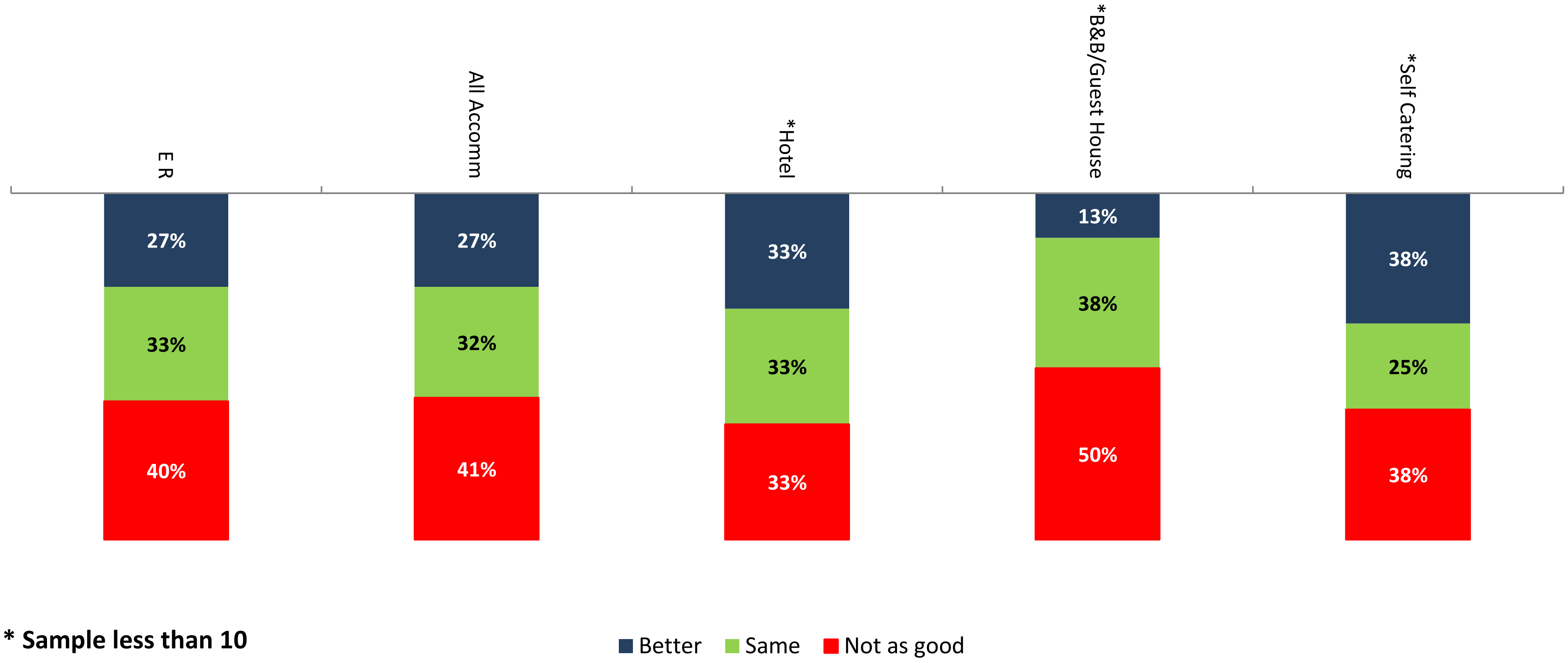


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Better	27%	25%	25%	-	-	21%	32%	28%	17%	33%	14%	33%
The same	33%	43%	75%	-	-	49%	36%	39%	42%	33%	57%	33%
Not as good	40%	32%	-	-	-	31%	32%	33%	42%	33%	29%	33%
Base	30	147	<5	-	-	39	53	18	12	<5	14	<5

Business Type Outlook – Booking Levels January 2015 (2015 v 2014)

59% of all accommodation providers reported that their January 2015 booking levels were looking better than (27%) or the same as (32%) January 2014 whilst 41% said that they were looking worse.

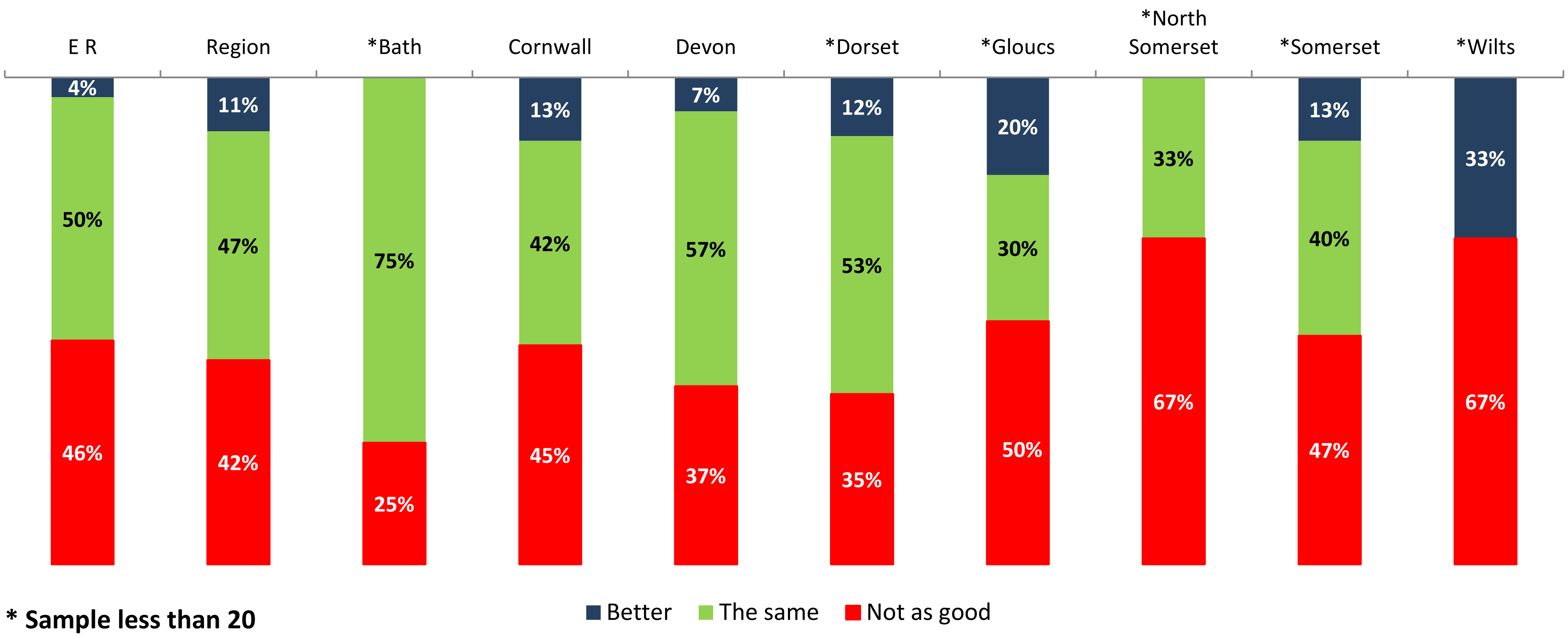


*** Sample less than 10**

Booking levels	ER	Accomm	*Hotel	*B&B/ Guest House	*Self Catering	*Holiday Park	*Caravan/campsite
Better	27%	27%	33%	13%	38%	-	-
Same	33%	32%	33%	38%	25%	-	-
Not as good	40%	41%	33%	50%	38%	-	-
Base	30	22	6	8	8	-	-

Area Outlook – Booking Levels February 2015 (2015 v 2014)

54% of English Riviera businesses reported that their booking levels for February 2015 were looking better than (4%) or the same as (50%) February 2014, compared with 58% of businesses within the region as a whole and 56% in Devon. 46% of businesses reported that their February 2015 booking levels were looking worse than in 2014 compared with 42% of businesses in the region as a whole and 37% in Devon.

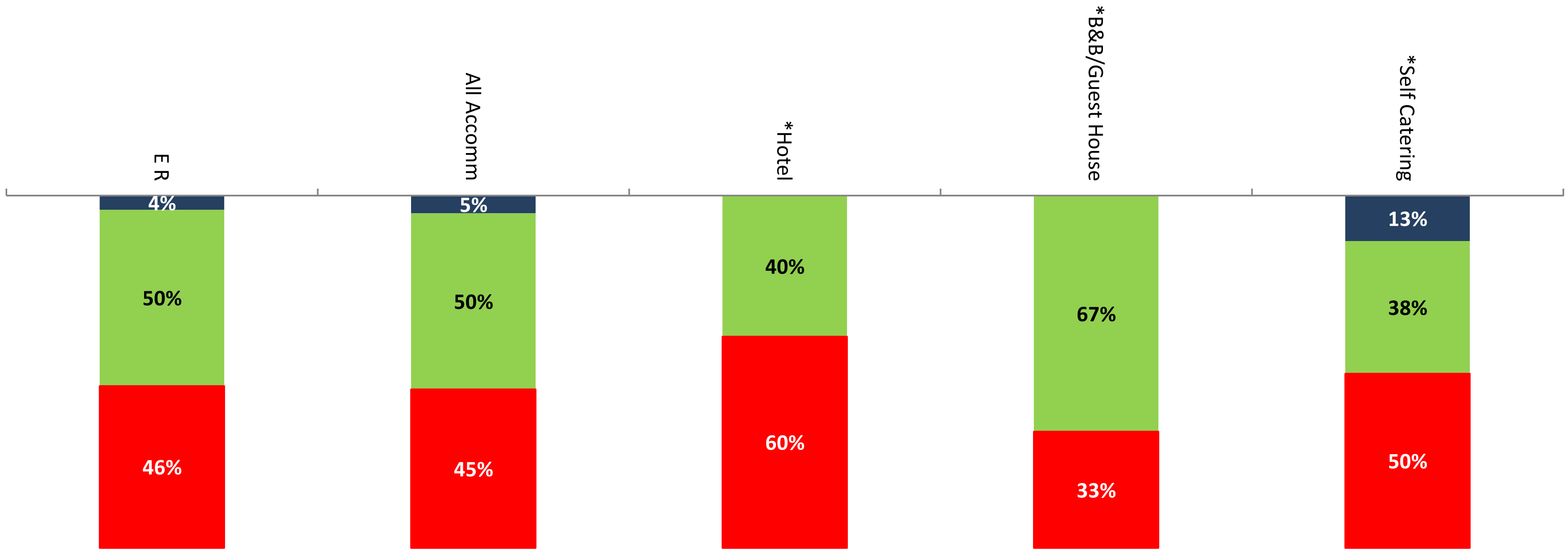


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Better	4%	11%	-	-	-	13%	7%	12%	20%	-	13%	33%
The same	50%	47%	75%	-	-	42%	57%	53%	30%	33%	40%	-
Not as good	46%	42%	25%	-	-	45%	37%	35%	50%	67%	47%	67%
Base	28	137	<5	-	-	38	46	17	10	<5	15	<5

Business Type Outlook – Booking Levels February 2015 (2015 v 2014)

55% of all accommodation providers reported that their February 2015 booking levels were looking better than (5%) or the same as (50%) February 2014 whilst 45% said that they were looking worse.



*** Sample less than 10**

Booking levels	ER	Accomm	*Hotel	*B&B/ Guest House	*Self Catering	*Holiday Park	*Caravan/campsite
Better	4%	5%	-	-	13%	-	-
Same	50%	50%	40%	67%	38%	-	-
Not as good	46%	45%	60%	33%	50%	-	-
Base	28	22	5	9	8	-	-

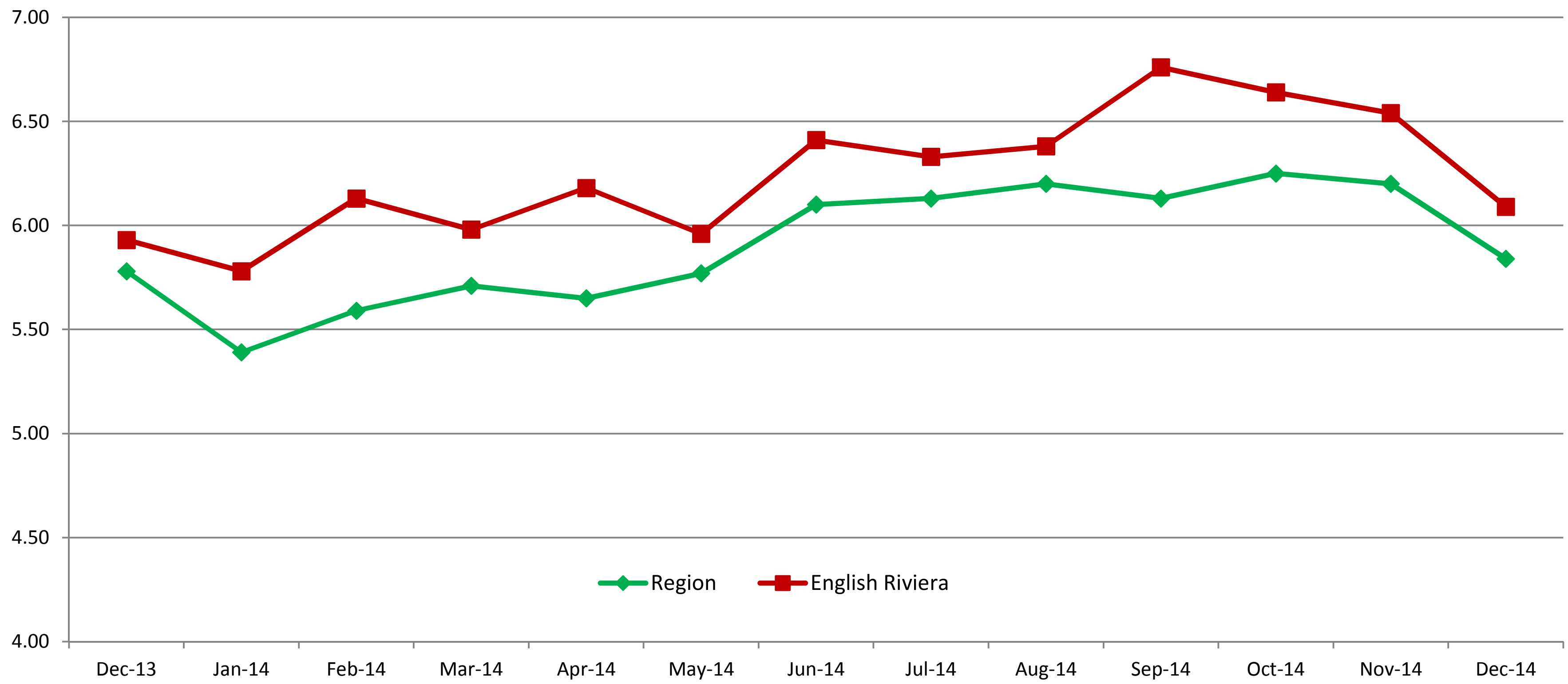
English Riviera Tourism Monitor

December 2014

Business Optimism

Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.09 for December 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. This is a decrease compared with the optimism score recorded last month (6.54) but it compares favourably with the South West regional score for December 2014 of 5.84.



Optimism	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14	Dec-14
English Riviera	5.93	5.78	6.13	5.98	6.18	5.96	6.41	6.33	6.38	6.76	6.64	6.54	6.09
Region	5.78	5.39	5.59	5.71	5.65	5.77	6.10	6.13	6.20	6.13	6.25	6.20	5.84

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 26% of all respondents provided additional comments this month covering a variety of themes with school term-time holiday taking changes, parking and funding cuts featuring highly.

Empty shops and parking are the negatives. The Bay has lots to offer visitors but the negatives can turn them away before they find them.

Stop people using Goodrington beach as a dog toilet. It's one of the beaches that you can take a dog on all year round. It should be stopped in the summer months at least!

ERTC does not have a high enough profile on the net.

The bookings for early spring are well down as there are very few two day or more events at the Riviera Centre this year - a performance driven conference marketing and accommodation booking service should be a key objective in BID.

December had a marked increase compared to 2013. One of the reasons was the day Christmas fell (on a Thursday). The gap between Christmas and New Year was useful with all properties filled as days fell on good days of the week. Bookings since Christmas up 50% compared to similar time of year 12 months ago but I am very concerned at loosing our destination marketing at such a pivotal point and all the good lost. The Mayor has caused great potential damage to our major industry that could cause huge loss of jobs and wealth in our economy.

The new development on the old Palm Court site looks great and shows that people do want to up grade and will use new developments, so many things could happen if the council allows changes. This needs to happen with the town management. I thought the whole idea of a manager was to manage. Just look at what Newton Abbot is achieving. This could and should be Torquay, time for some changes before we loose the town altogether.

Road works on-going through Fleet Street have been a disturbance

Lack of general advertising by the ERTC and lack of support by the Mayor

Business Optimism

There is a total lack of strategy for Brixham Town centre/harbour frontage. We have now been kept dangling for 20 years or so with the promise of a supermarket, the high street is dying in front of our eyes with more shops closing and the odd one replaced by a charity shop. The car park is an eye sore, its seen as a cash cow for the council with no understanding what impact tariffs are having on local trade and tourism, our town square, which is the first area that people see who get off the bus, is strewn with broken benches, broken slabs and weed infested garden area. The old Threshers site has been covered in black bitumen and the building is being propped up with scaffolding. Our town has so much potential but there is little ambition, desire or vision from the council to realise that potential.

We must get parking sorted in Town Centres and promoted, we must offer the best and that includes parking

Torquay town centre needs a complete shake up. The Bid has been a complete waste of time and quite frankly a shambles. After 15 years of business I am selling up. No help is provided by the council or Bid. Everybody is very quick to pass the buck.

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

The South West Research Company