English Riviera Tourism Monitor

July 2014

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

September 2014

Executive Summary

ENGLISH RIVIERA TOURISM COMPANY
WORKING IN PARTNERSHIP

Compared to July 2013 businesses reported that:

July 2014 Visitor levels:

Increased 42% / Stayed the same 22% / Decreased 36%

Estimated actual change in visitors +0.1%

July 2014 Turnover levels:

Increased 43% / Stayed the same 24% / Decreased 33%

Estimated actual change in turnover +0.1%

July 2014 Profitability was:

Higher 32% / Stayed the same 31% / Decreased 37%

August 2014 Outlook is:

Better 27% / Same as last year 44% / Not as good 29%

September 2014 Outlook is:

Better 13% / Same as last year 39% / Not as good 48%

Optimism

Optimism score is 6.33 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.

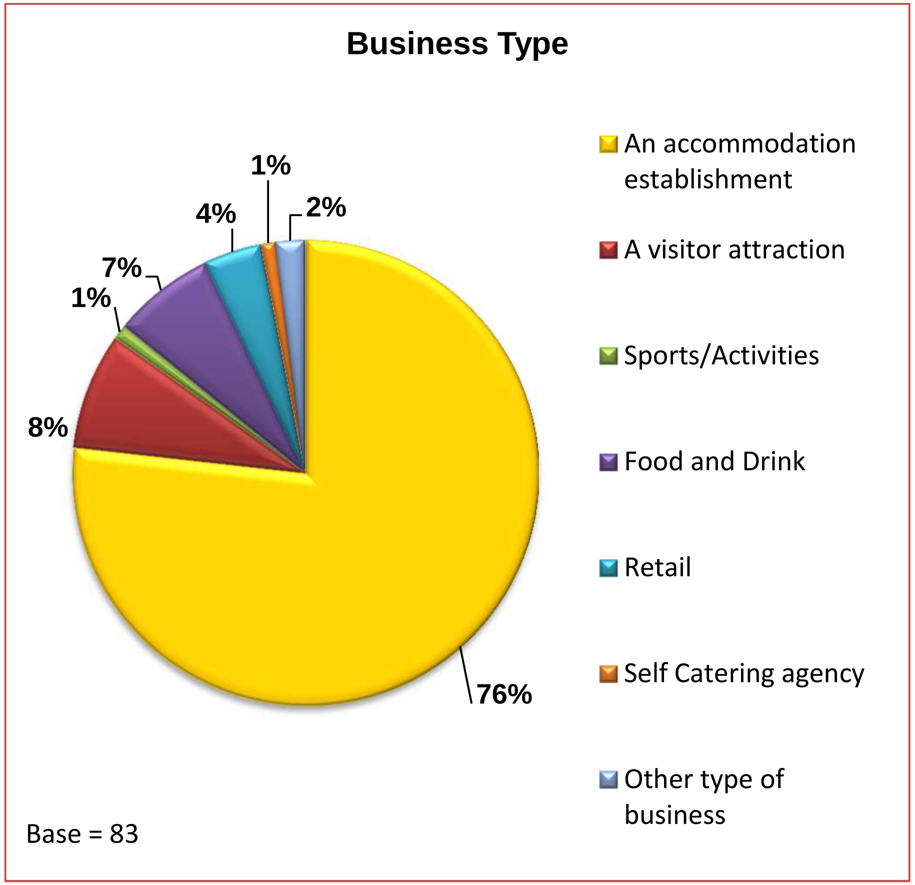
Wherever possible, this report will provide comparisons against regional data to enable the ERTC to benchmark its performance.

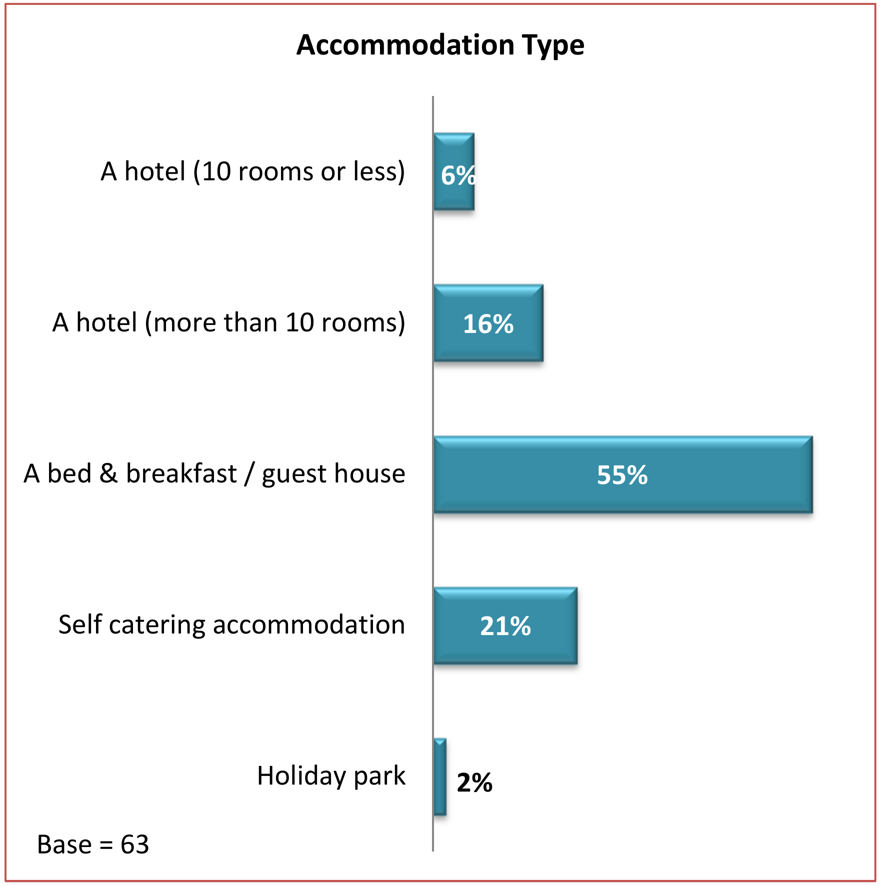
English Riviera Tourism Monitor

July 2014

Sample Profile

Business Type

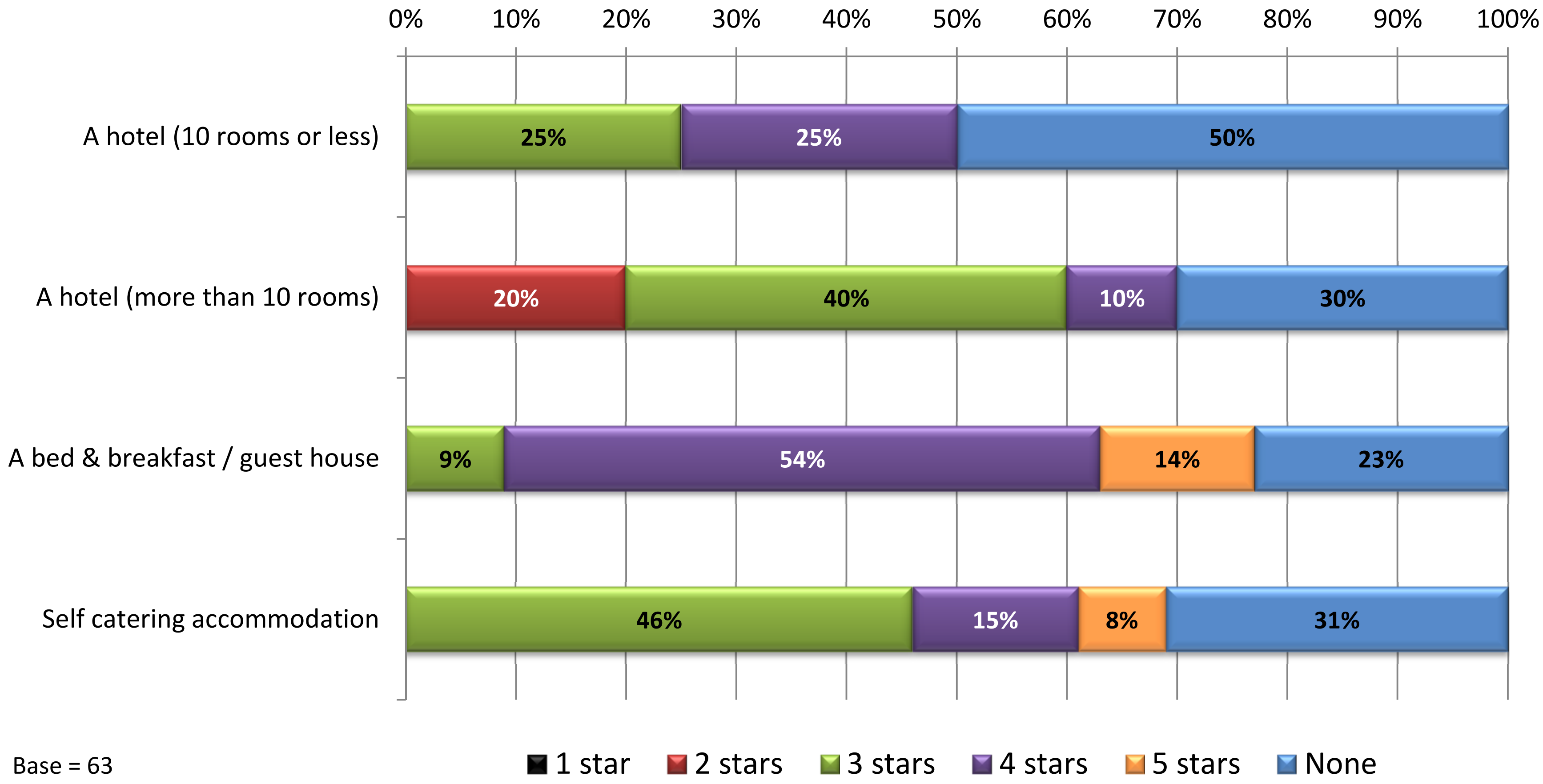




Accommodation providers accounted for 76% of responses, Visitor Attractions 8% and Food & Drink establishments 7%.

Serviced accommodation providers accounted for 77% of accommodation responses.

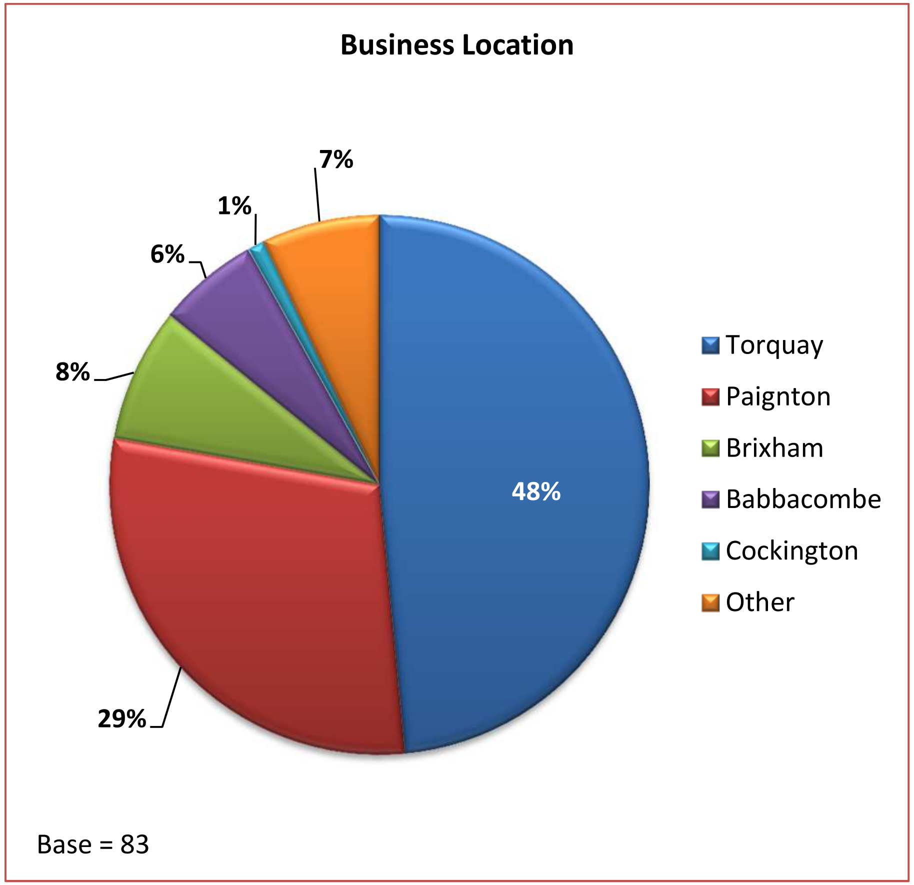
Accommodation Type and Rating

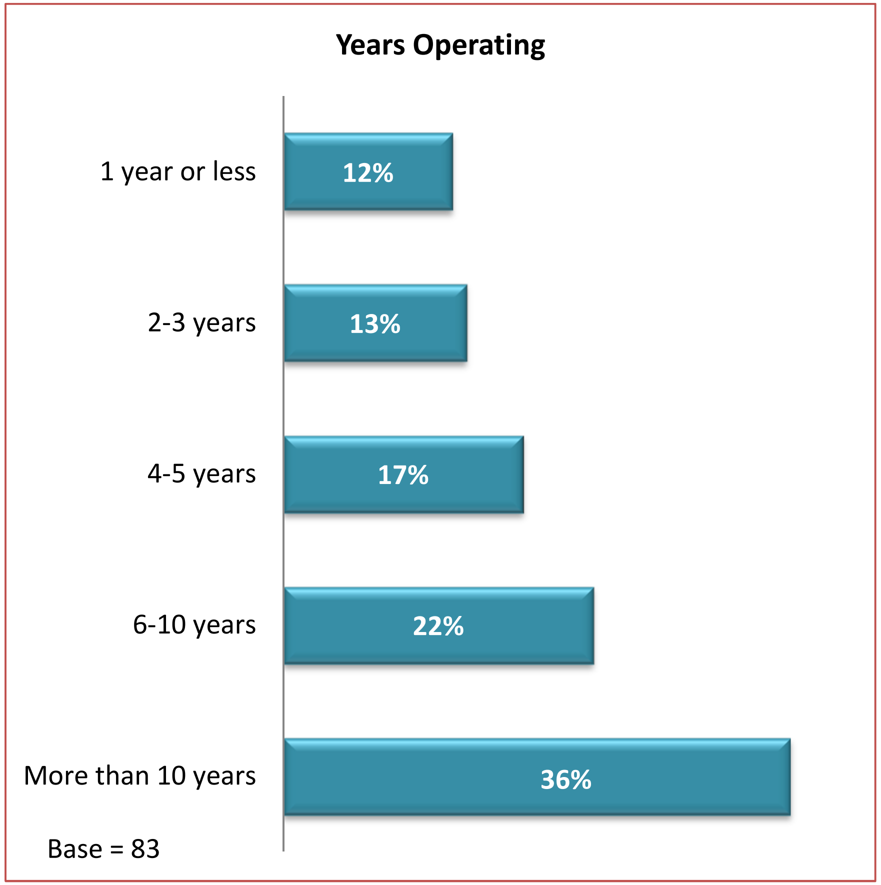


Base = 63

50% of hotels with 10 rooms or less, 31% of self catering businesses, 30% of hotels with more than 10 rooms and 23% of bed & breakfast/guest house businesses responding to the survey were not quality graded.

Business Location and Years Operating





Torquay businesses accounted for 48% of responses with 29% from Paignton. A further 8% of businesses were from Brixham, 6% from Babbacombe and 1% from Cockington. 7% of businesses were based elsewhere in the resort.

58% of businesses have been operating for more than 6 years.

English Riviera Tourism Monitor

July 2014

The Month in Context

July 2014 – The Month in Context

The UK weather

Temperatures for July were above average across the UK, mainly due to warm days with many days having maximum temperatures above 25 °C, especially in the south-east. However, night-time temperatures were closer to average. There was plenty of warm, dry, sunny weather but with the warmth leading to thunderstorms and localised downpours at times; the heaviest rain was generally across the south-east and East Anglia.

The provisional UK mean temperature was 16.3 °C, which is 1.2 °C above the 1981-2010 long-term average. This ranks as the equal-8th warmest July in a series from 1910 but was not as warm as July 2013. July 2014 was the 8th consecutive month with above average temperatures for the UK. Rainfall was rather below average overall, particularly across Devon, Cornwall and south-west Wales but well above average in parts of East Anglia. The UK overall received 82% of average rainfall. It was a sunny month for most areas, especially the west and north, with 133% of average sunshine hours for the UK overall making it provisionally the sixth sunniest July in a series since 1929 - though not as sunny as July 2013.

A maximum temperature of 32.3 °C was recorded at Gravesend (Kent) on the 18th. A minimum temperature of 1.2 °C was recorded at Braemar (Aberdeenshire) on the 6th. In the 24 hours ending at 0900 GMT on the 28th, 51.2 mm of rain fell at Santon Downham (Suffolk). A wind gust of 59 mph were recorded at Warcop Range (Cumbria) on the 18th.

Source: Met Office

July 2014 – The Month in Context

Weather impacts

Heavy showers caused some localised flooding in parts of England and Wales on the 7th and the 8th with some notably high rainfall totals. The 10th was a wet and particularly cool day for parts of eastern England. A warm spell of weather around mid-month ended in thunderstorms and heavy showers for some regions during Friday 18th to Sunday 20th; Norwich Airport recorded 45.8 mm - three-quarters of the normal monthly rainfall amount - in one hour. There was some flooding and disruption reported, with damage due to lightning strikes and problems with railway signalling equipment.

Heavy showers and thunderstorms resulted in some large rainfall totals in south-east England from 27th to 29th. Flash flooding caused localised problems on roads and railways in parts of Sussex on the morning of the 28th.

The Opening Ceremony of the Commonwealth Games in Glasgow on 23rd July and first few days of competition saw plenty of fine, warm, sunny weather. However, unfortunately the warm and often rather humid conditions resulted in ideal conditions for slugs in the UK's gardens and also for mosquitoes in the London area.

Source: Met Office

July 2014 – The Month in Context

The UK Economy

The UK economy has returned to pre-crisis levels by expanding 0.8% in the second quarter of this year.   On an annual basis gross domestic product (GDP) expanded by 3.1%. The figures show the economy is now worth 0.2% more than it was at its peak in 2008, the Office for National Statistics (ONS) said. The service sector is the only part of the economy that has passed its previous 2008 peak, although that accounts for almost 80% of UK output.

Other key sectors, including construction, industrial production and manufacturing, have yet to outstrip levels reached in 2008. The UK economy is forecast to be the fastest growing among the G7 developed nations, according to the International Monetary Fund (IMF). The IMF predicted the UK would expand by 3.2% this year, up from a previous forecast of 2.8%.

Chancellor George Osborne said: "Thanks to the hard work of the British people, today we reach a major milestone in our long-term economic plan.“

But shadow chancellor, Ed Balls, said people were not feeling happier: "With GDP per head not set to recover for three more years and [with] most people still seeing their living standards squeezed this is no time for complacent claims that the economy is fixed."

Source: The BBC

English Riviera Tourism Monitor

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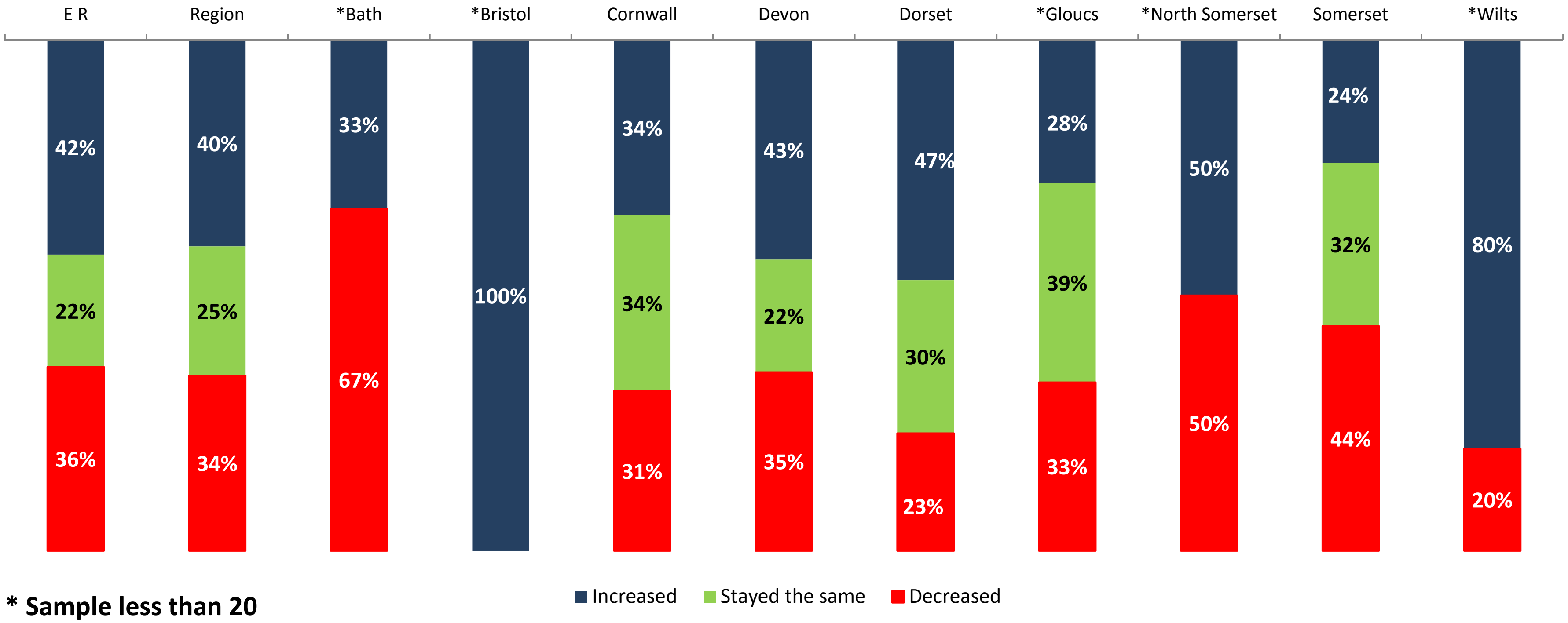
Performance

Performance – Visitor Numbers (2014-2013)

64% of English Riviera businesses reported that their visitor numbers had increased (42%) or remained level (22%) compared with July 2013 – a similar proportion when compared with the region as a whole during the same period (65%). 36% of businesses indicated that their visitor numbers had decreased compared with the same time last year (34% regionally).



*** Sample less than 20**

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	42%	40%	33%	-	100%	34%	43%	47%	28%	50%	24%	80%
Stayed the same	22%	25%	-	-	-	34%	22%	30%	39%	-	32%	-
Decreased	36%	34%	67%	-	-	31%	35%	23%	33%	50%	44%	20%
Base	77	252	<5	-	<5	35	127	30	18	6	25	5

Performance – Estimated occupancy levels July 2014

The slides to follow show the estimated occupancy for July 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		
July-14	**% RM OCCUPANCY**	**SAMPLE**
English Riviera	81.71%	46
All hotels	84.54%	14
Hotel 10 rooms or less	70.39%	<5
Hotel more than 10 rooms	85.26%	10
B&B	69.14%	12
Guest House	69.55%	20
Torquay	84.07%	23
Paignton	72.63%	15
Brixham	74.92%	<5
Babbacombe	56.99%	<5
**Cockington	0.00%	0
Other English Riviera	90.32%	<5
Devon	80.49%	59
South West	81.27%	95

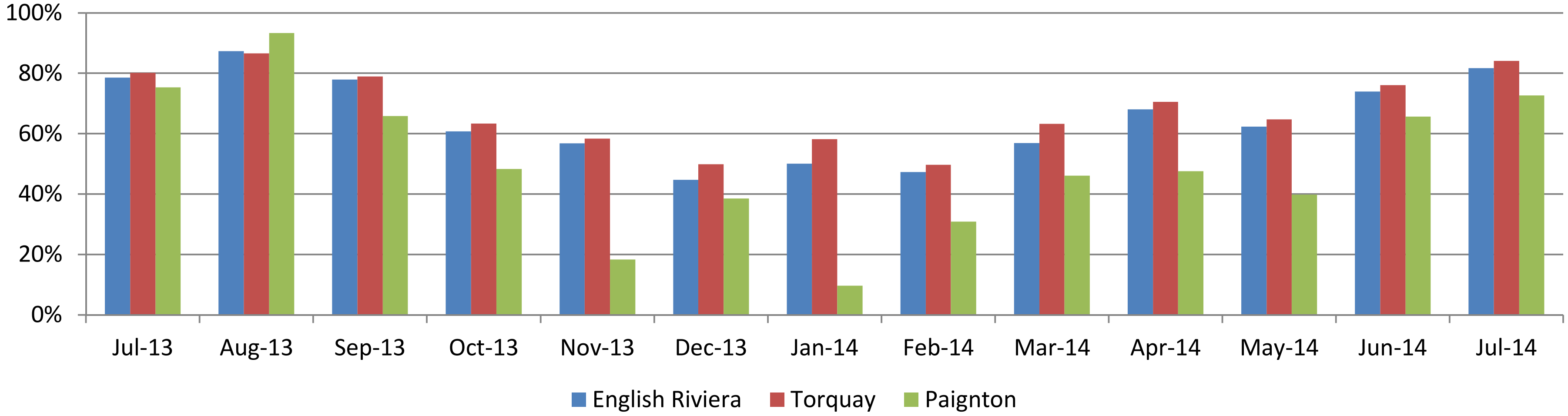
English Riviera serviced room occupancy was calculated at 81.71% for July 2014 compared with an average of 81.27% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for July 2014 was calculated at 62.92% compared with 80.33% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY		
July-14	**% UNIT OCC**	**SAMPLE**
English Riviera	62.92%	13
Self-catering accommodation	62.92%	13
Holiday Park	0.00%	0
Torquay	57.30%	6
Paignton	67.16%	6
Brixham	0.00%	0
Babbacombe	0.00%	<5
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	74.57%	76
South West	80.33%	32

****Cockington data added to Torquay due to small sample**

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



SERVICED ROOM OCCUPANCY	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	Jul-14
English Riviera	78.61%	87.34%	77.96%	60.75%	56.83%	44.72%	50.07%	47.32%	56.90%	68.04%	62.36%	73.97%	81.71%
Torquay	80.10%	86.56%	78.96%	63.34%	58.40%	49.88%	58.22%	49.69%	63.22%	70.50%	64.72%	76.09%	84.07%
Paignton	75.31%	93.28%	65.84%	48.34%	18.32%	38.51%	9.63%	30.84%	46.09%	47.56%	39.8%	65.65%	72.63%
Brixham	*	82.19%	*	*	*	*	*	*	*	*	*	*	*
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 July 2014 English Riviera serviced occupancy was higher than Devon, Dorset, Gloucestershire, Somerset and the South West region as a whole.

Key comparisons;
South West – ER performance was higher than the regional average during January, February, April and July 2014.
Devon – ER performance was higher than Devon during all months except June 2014.

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14
South West	46.15%	47.12%	57.12%	63.21%	62.73%	75.60%	81.27%
Former Avon	*	*	*	*	*	*	*
Cornwall	*	36.61%	48.59%	50.82%	57.60%	67.16%	86.28%
Devon	47.35%	44.94%	54.86%	66.40%	61.49%	73.97%	80.49%
English Riviera	**50.07%**	**47.32%**	**56.90%**	**68.04%**	**62.36%**	**73.97%**	**81.71%**
Dorset	54.58%	27.23%	*	44.59%	52.09%	*	73.06%
Gloucestershire	*	*	77.59%	41.92%	61.65%	*	71.38%
Somerset	32.48%	46.42%	37.22%	65.40%	70.42%	55.84%	67.91%
Wiltshire	56.85%	59.82%	*	*	60.50%	*	*

*** Sample size less than 5**

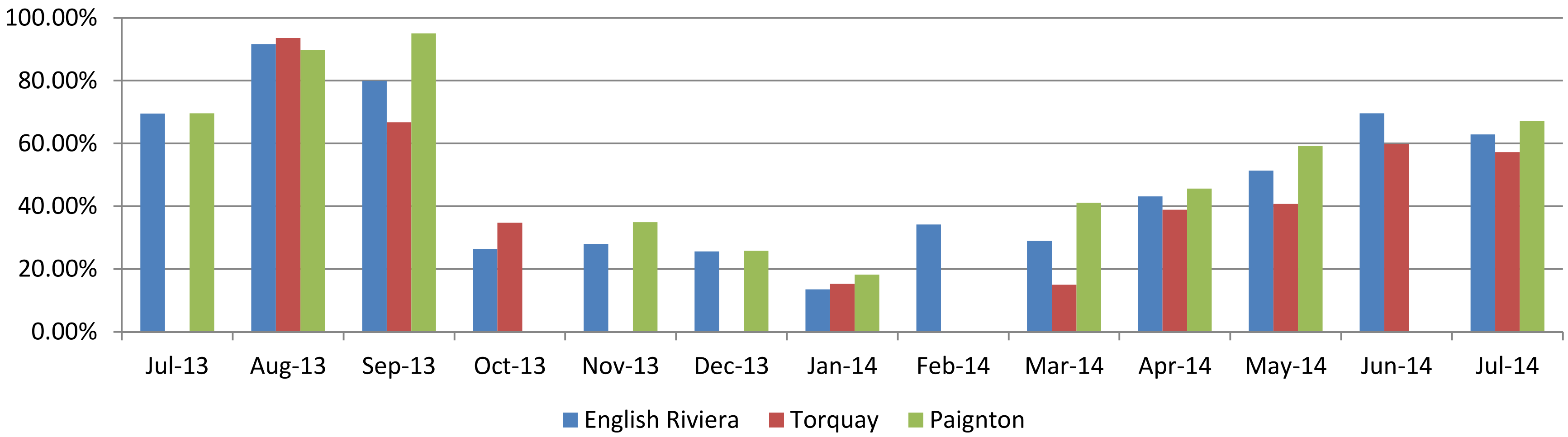
Performance – Estimated serviced accommodation occupancy levels 2014 by type

Key comparisons;
All ER Hotels – Higher than the regional average during all months except March and June 2014.
ER Hotels (10 rooms or less) – Lower than the regional average during January, February, May and June 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 2014.

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14
All ER hotels	**55.42%**	**52.05%**	**61.01%**	**71.96%**	**67.17%**	**77.30%**	**84.54%**
All SW hotels	50.76%	51.93%	62.15%	67.71%	67.08%	77.84%	84.07%
ER Hotel 10 rooms or less	**12.36%**	**14.78%**	*	*	**21.41%**	**25.30%**	**70.39%**
SW Hotel 10 rooms or less	19.22%	26.75%	*	29.78%	38.48%	39.30%	69.51%
ER Hotel more than 10 rooms	**57.54%**	**54.40%**	**61.01%**	**73.42%**	**68.62%**	**83.44%**	**85.26%**
SW Hotel more than 10 rooms	52.93%	56.10%	62.54%	69.50%	68.17%	81.33%	84.68%
ER B&B/Guest House	**8.34%**	**17.56%**	**20.79%**	**31.82%**	**37.21%**	**53.16%**	**69.42%**
SW B&B/Guest House	23.00%	26.78%	23.34%	35.27%	45.25%	65.03%	68.24%

*** Sample size less than 5**

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



SELF-CATERING UNIT OCCUPANCY	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14
All ER Self-catering	69.57%	91.68%	79.96%	26.37%	28.01%	25.64%	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%	62.92%
Torquay	*	93.62%	66.74%	34.79%	*	*	15.30%	*	15.00%	38.92%	40.78%	59.87%	57.30%
Paignton	69.66%	89.78%	95.12%	*	34.90%	25.76%	18.22%	*	41.09%	45.67%	59.19%	*	67.16%
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 July 2014 English Riviera self-catering unit occupancy was lower than all comparison areas with the exception of Somerset.

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

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14
South West	16.89%	12.88%	30.19%	61.36%	39.19%	47.15%	74.57%
Former Avon	*	*	*	*	*	*	*
Cornwall	15.25%	12.77%	36.89%	66.71%	28.26%	63.33%	70.68%
Devon	12.76%	35.44%	33.21%	58.18%	51.69%	63.96%	80.33%
English Riviera	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**
Dorset	19.71%	7.40%	13.98%	48.33%	63.30%	14.01%	68.96%
Gloucestershire	*	7.06%	*	88.79%	*	*	*
Somerset	19.23%	4.88%	17.89%	54.98%	31.82%	56.92%	54.20%
Wiltshire	*	0.00%	*	*	*	*	*

*** Sample size less than 5**

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

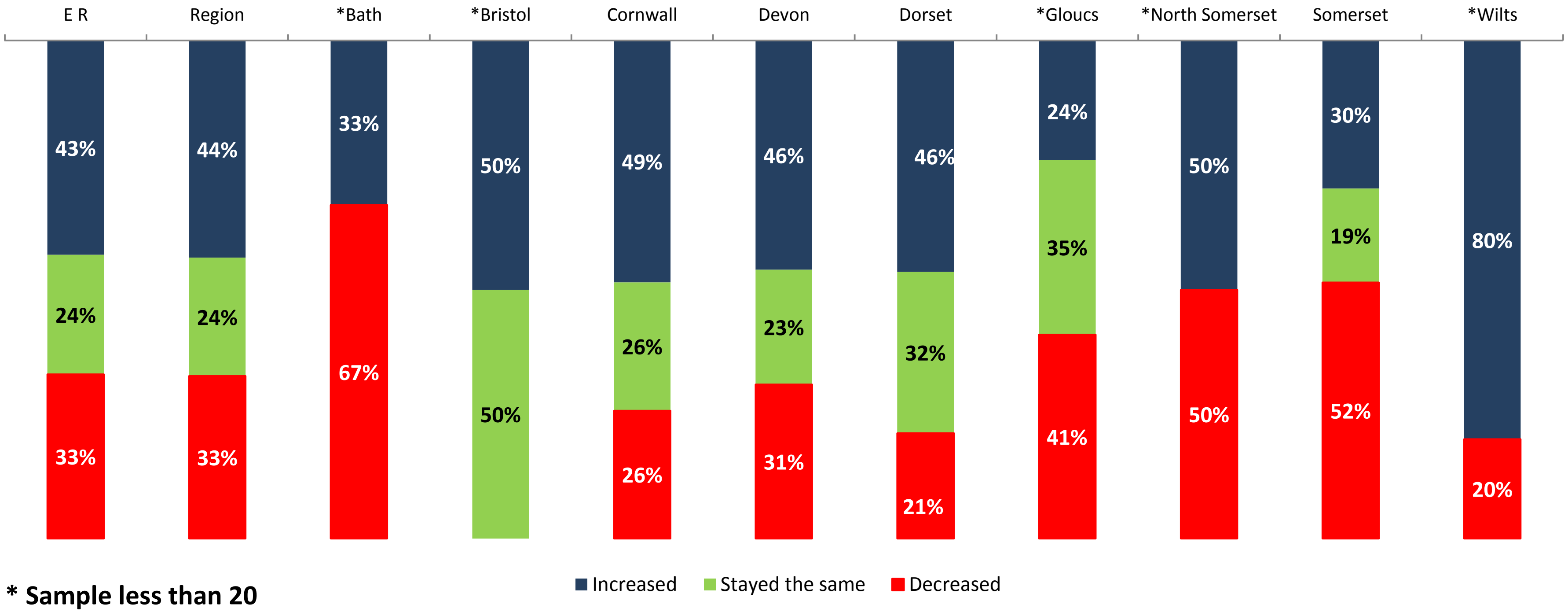
Key comparisons;
All ER Self-catering – Higher than the regional average during February, May and June 2014.
ER Self-catering (not including Holiday Parks) – Higher than the regional average in February, March, May and June 2014.

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14
All ER Self-catering	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**
All SW Self-catering	16.89%	21.04%	30.19%	61.36%	39.19%	47.15%	74.57%
ER Self-catering	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**
SW Self-catering	16.89%	21.04%	26.18%	46.64%	48.72%	58.10%	78.15%
ER Holiday Park	*	*	*	*	*	*	*
SW Holiday Park	*	*	32.47%	66.33%	28.41%	*	56.51%

*** Sample size less than 5**

Performance – Turnover (2014-2013)

67% of English Riviera businesses reported increased (43%) or level turnover (24%) during July 2014 compared with July 2013, a similar proportion when compared with the region as a whole during the same period (68%). 33% of English Riviera businesses reported decreased turnover during July 2014, the same proportion as the region as a whole.



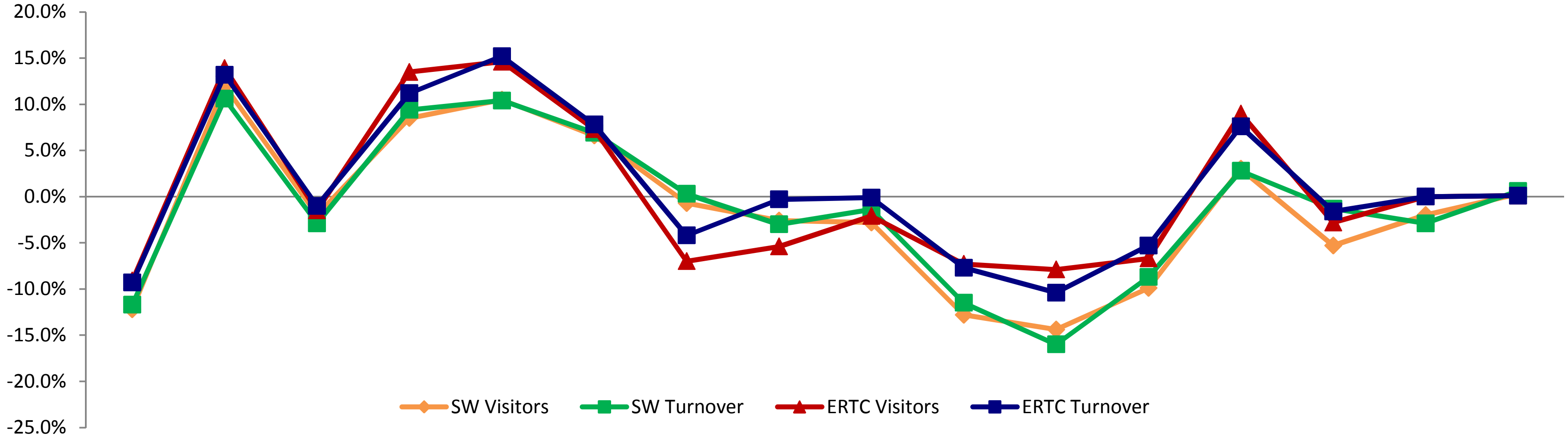
*** Sample less than 20**

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	43%	44%	33%	100%	50%	49%	46%	46%	24%	50%	30%	80%
Stayed the same	24%	24%	-	50%	50%	26%	23%	32%	35%	-	19%	-
Decreased	33%	33%	67%	-	-	26%	31%	21%	41%	50%	52%	20%
Base	72	245	<5	-	<5	35	121	28	17	6	27	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 July 2014 English Riviera businesses reported an increase of 0.1% in terms of both visitors and turnover compared with July 2013 and compared with increases of 0.3% and 0.6% in terms of visitors and turnover during the same period for the region as a whole.

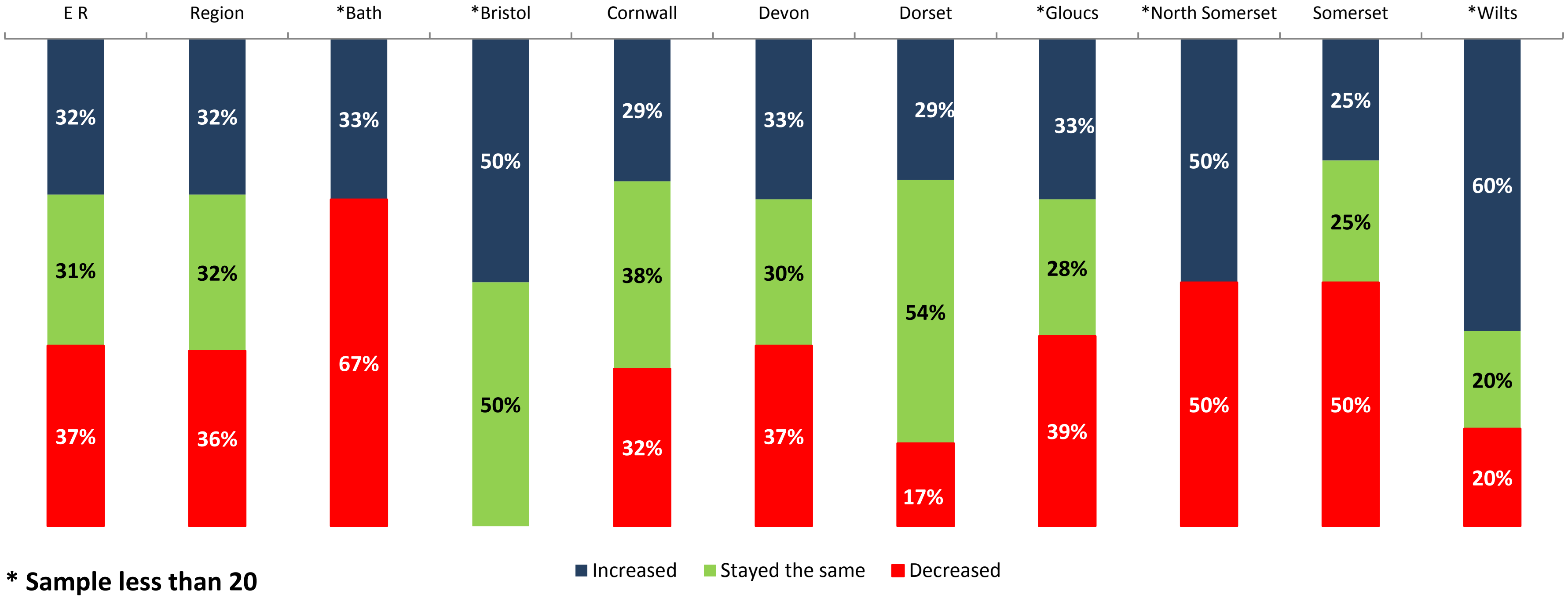
ERTC	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14
Visitors	-9.1%	13.9%	-1.5%	13.5%	14.6%	7.3%	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%	9.0%	-2.8%	0.0%	0.1%
Turnover	-9.3%	13.2%	-1.0%	11.2%	15.2%	7.8%	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%	7.6%	-1.6%	0.0%	0.1%



Region	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	May-14	Jun-14	Jul-14
Visitors	-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%	-5.3%	-2.0%	0.3%
Turnover	-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%	-1.3%	-2.9%	0.6%

Performance – Profitability (2014-2013)

63% of all English Riviera businesses reported increased (32%) or level profitability (31%) for the month, a similar proportion to the SW region as a whole during the same period (64%). 37% of businesses reported their profitability as being lower than during July 2013 (36% of SW businesses).



*** Sample less than 20**

Profitability	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	32%	32%	33%	100%	50%	29%	33%	29%	33%	50%	25%	60%
Stayed the same	31%	32%	-	50%	50%	38%	30%	54%	28%	-	25%	20%
Decreased	37%	36%	67%	-	-	32%	37%	17%	39%	50%	50%	20%
Base	68	229	<5	-	<5	34	112	24	18	6	24	5

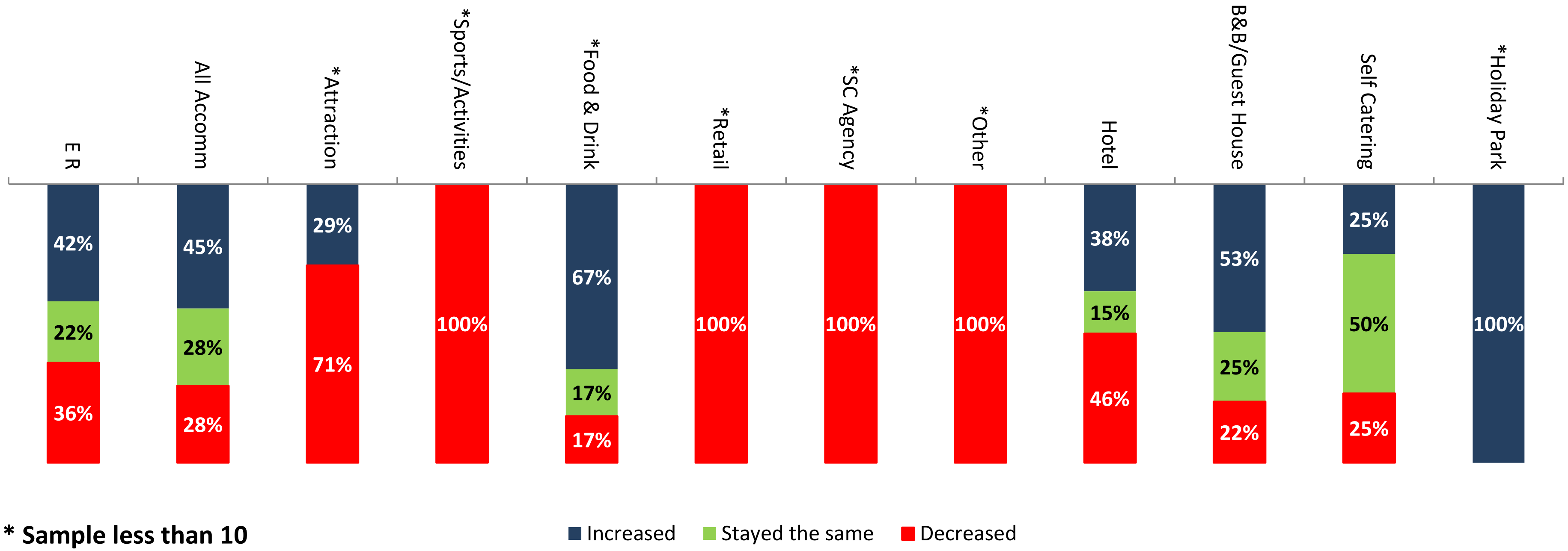
English Riviera Tourism Monitor

July 2014

Business Type Performance

Business Type Performance – Visitor numbers (2014-2013)

45% of all accommodation providers reported increased visitor numbers for July 2014 compared with 29% of Visitor Attractions. 88% of B&B/Guest Houses and 75% of Self Catering operators reported increased or level visitor numbers for July 2014 compared with the same time last year along with 53% of Hotels. 46% of Hotels reported decreased visitor numbers compared with the same time last year.

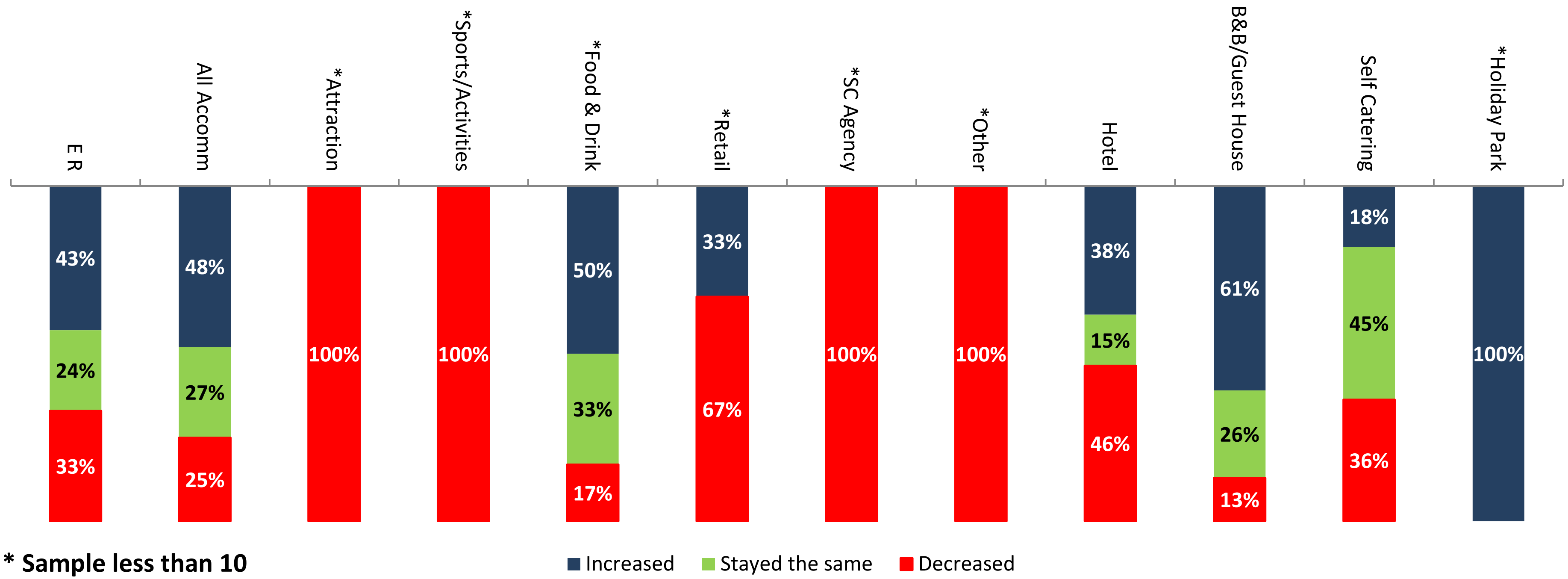


*** Sample less than 10**

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	42%	45%	29%	-	67%	-	-	-	-	38%	53%	25%	100%	-
Stayed the same	22%	28%	-	-	17%	-	-	-	-	15%	25%	50%	-	-
Decreased	36%	28%	71%	100%	17%	100%	-	100%	100%	46%	22%	25%	-	-
Base	77	58	7	<5	6	<5	-	<5	<5	13	32	12	<5	-

Business Type Performance – Turnover (2014-2013)

75% of all accommodation providers reported increased (48%) or level turnover (27%) for July 2014. 87% of B&B/Guest Houses and 63% of Self Catering operators reported increased or level turnover for July 2014 compared with the same time last year along with 53% of Hotels. 46% of Hotels reported decreased turnover compared with the same time last year.

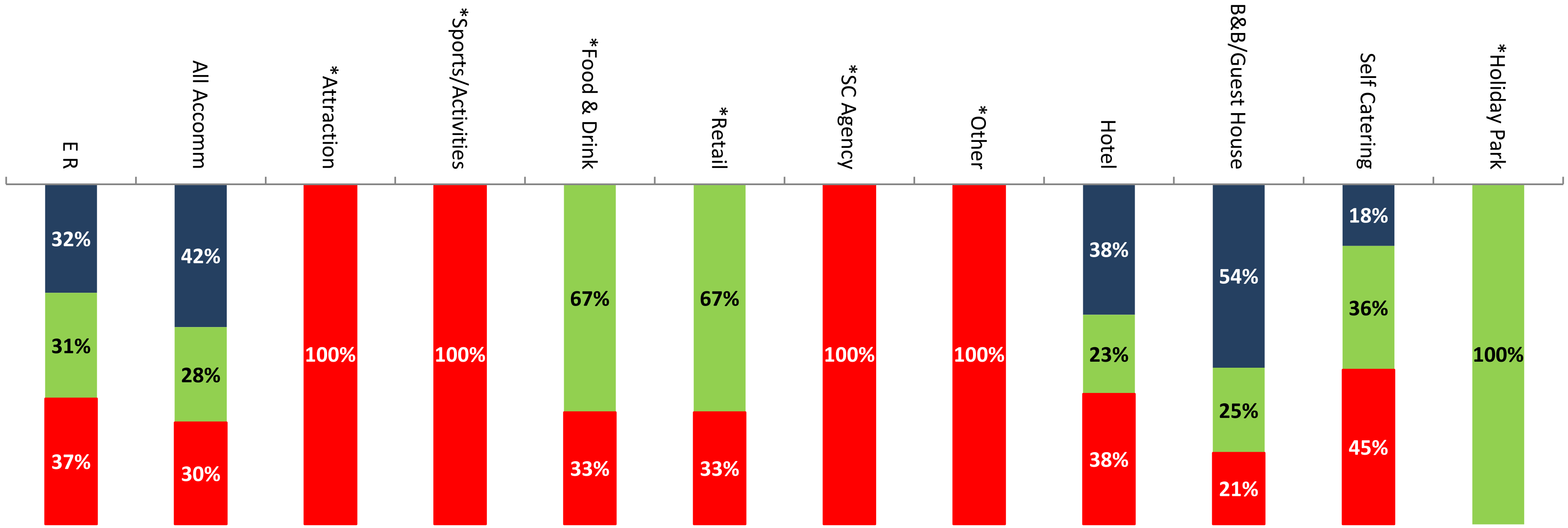


*** Sample less than 10**

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	43%	48%	-	-	50%	33%	-	-	-	38%	61%	18%	100%	-
Stayed the same	24%	27%	-	-	33%	-	-	-	-	15%	26%	45%	-	-
Decreased	33%	25%	100%	100%	17%	67%	-	100%	100%	46%	13%	36%	-	-
Base	72	56	<5	<5	6	<5	-	<5	<5	13	31	11	<5	-

Business Type Performance – Profitability (2014-2013)

70% of all accommodation providers reported increased (42%) or level (28%) profitability for July 2014. 79% of B&B/Guest Houses and 61% of Hotels reported increased or level profitability for July 2014 compared with the same time last year along with 54% of Self Catering operators. 45% of Self Catering operators and 38% of Hotels reported decreased profitability compared with July 2013.



*** 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	32%	42%	-	-	-	-	-	-	-	38%	54%	18%	-	-
Stayed the same	31%	28%	-	-	67%	67%	-	-	-	23%	25%	36%	100%	-
Decreased	37%	30%	100%	100%	33%	33%	-	100%	100%	38%	21%	45%	-	-
Base	68	53	<5	<5	6	<5	-	<5	<5	13	28	11	<5	-

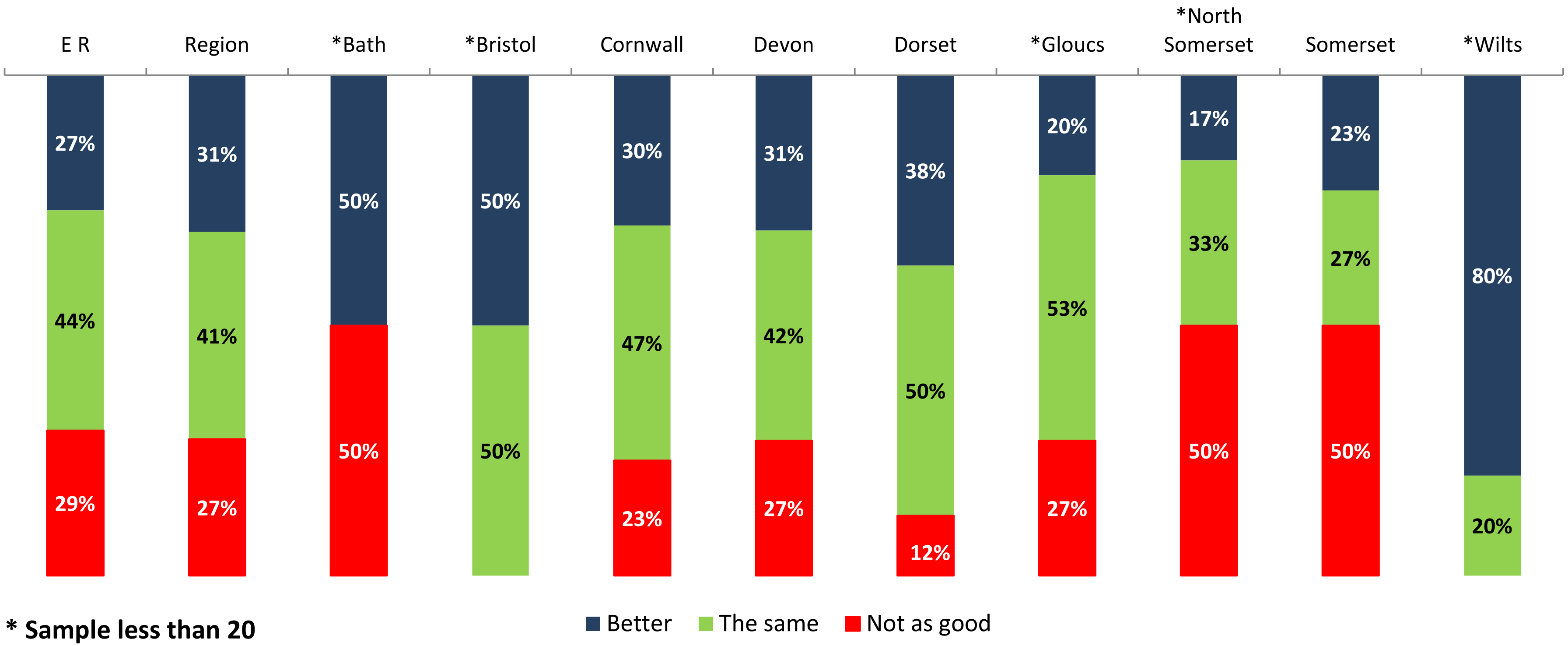
English Riviera Tourism Monitor

July 2014

Looking Ahead

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

71% of English Riviera businesses reported that their booking levels for August 2014 were looking better than (27%) or the same as (44%) August 2013, compared with 72% of businesses within the region as a whole and 73% of businesses in Devon.

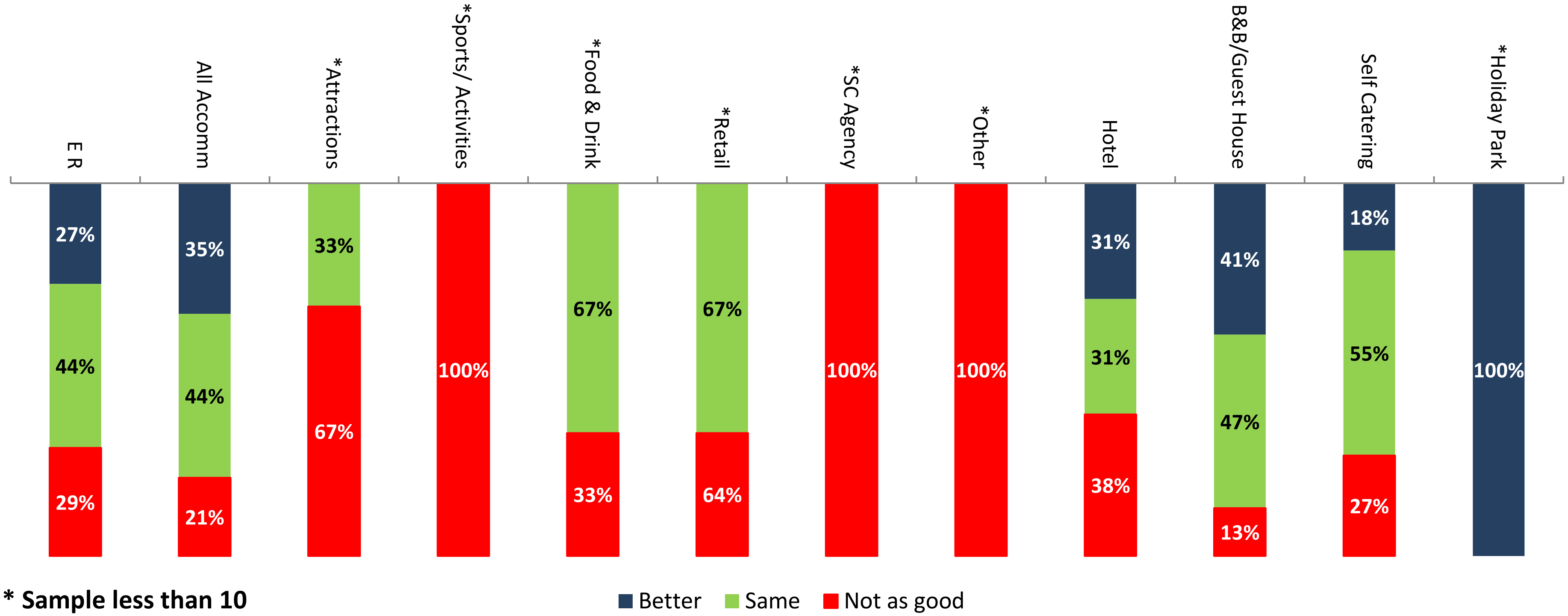


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	27%	31%	50%	-	50%	30%	31%	38%	20%	17%	23%	80%
The same	44%	41%	-	-	50%	47%	42%	50%	53%	33%	27%	20%
Not as good	29%	27%	50%	-	-	23%	27%	12%	27%	50%	50%	-
Base	75	230	<5	-	<5	30	117	26	15	6	26	5

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

79% of all accommodation providers reported that their August 2014 booking levels were looking better than (35%) or the same as (44%) last year. 88% of B&B/Guest Houses, 62% of Hotels and 73% of Self Catering operators reported that their booking levels for August 2014 were looking better than or the same as August 2013. 27% of Self Catering operators reported their booking levels as being lower than August 2013.

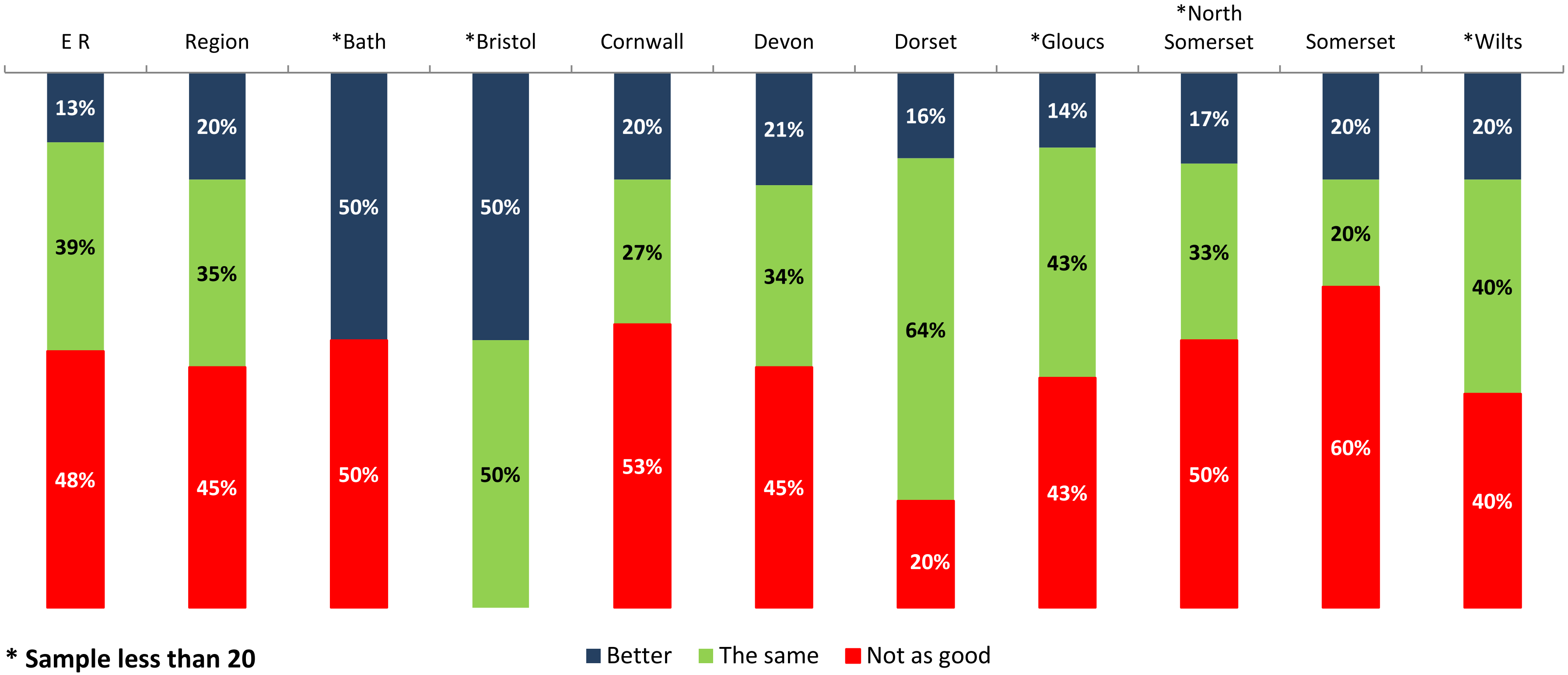


*** Sample less than 10**

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	27%	35%	-	-	-	-	-	-	31%	41%	18%	100%	-
Same	44%	44%	33%	-	67%	67%	-	-	31%	47%	55%	-	-
Not as good	29%	21%	67%	100%	33%	33%	100%	100%	38%	13%	27%	-	-
Base	75	57	6	<5	6	<5	<5	<5	13	32	11	<5	-

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

52% of all businesses reported that their September booking levels were looking better (13%) or the same as (39%) in 2013 compared with 55% of businesses in each case in the region as a whole and Devon.

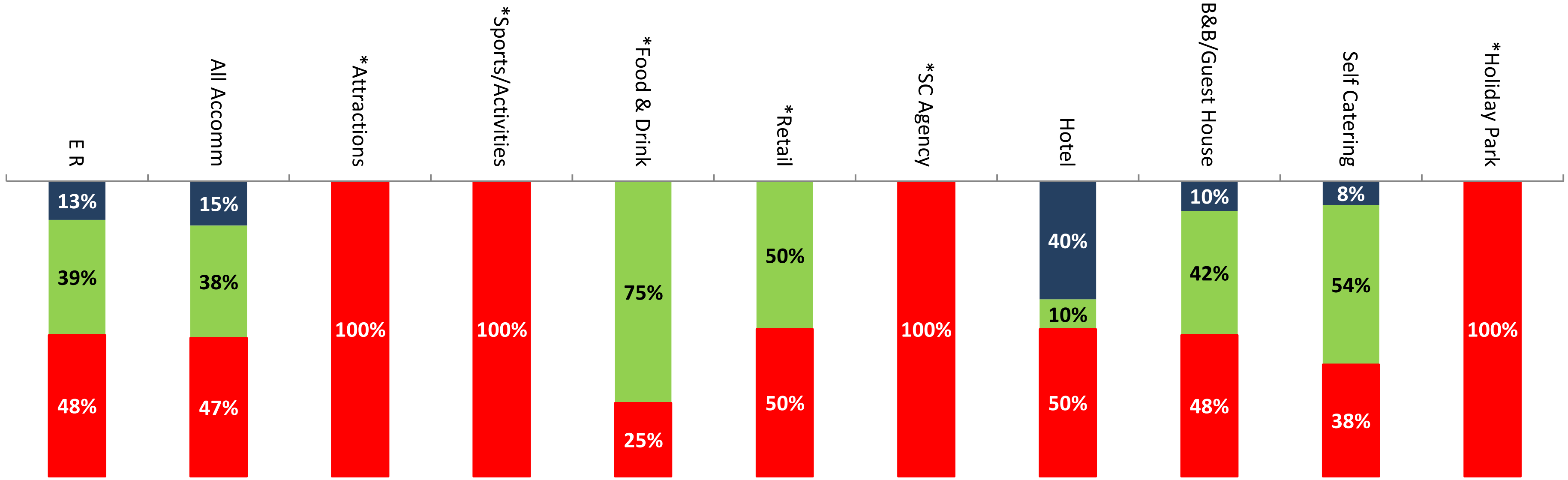


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	13%	20%	50%	-	50%	20%	21%	16%	14%	17%	20%	20%
The same	39%	35%	-	-	50%	27%	34%	64%	43%	33%	20%	40%
Not as good	48%	45%	50%	-	-	53%	45%	20%	43%	50%	60%	40%
Base	64	212	<5	-	<5	30	102	25	14	6	25	5

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

53% of all accommodation providers reported that their September 2014 booking levels were looking better than (15%) or the same as 2013 (38%) whilst 47% said that they were looking worse than 2013. 62% of Self Catering operators, 52% of B&B/Guest Houses and 50% of Hotels reported that their September 2014 booking levels were looking better than or the same as 2013. Half of all Hotels and 48% of B&B/Guest Houses reported that their booking levels were looking worse than 2013 along with 38% of Self Catering operators.



*** Sample less than 10**

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	13%	15%	-	-	-	-	-	-	40%	10%	8%	-	-
Same	39%	38%	-	-	75%	50%	-	-	10%	42%	54%	-	-
Not as good	48%	47%	100%	100%	25%	50%	100%	-	50%	48%	38%	100%	-
Base	64	55	<5	<5	<5	<5	<5	-	10	31	13	<5	-

English Riviera Tourism Monitor

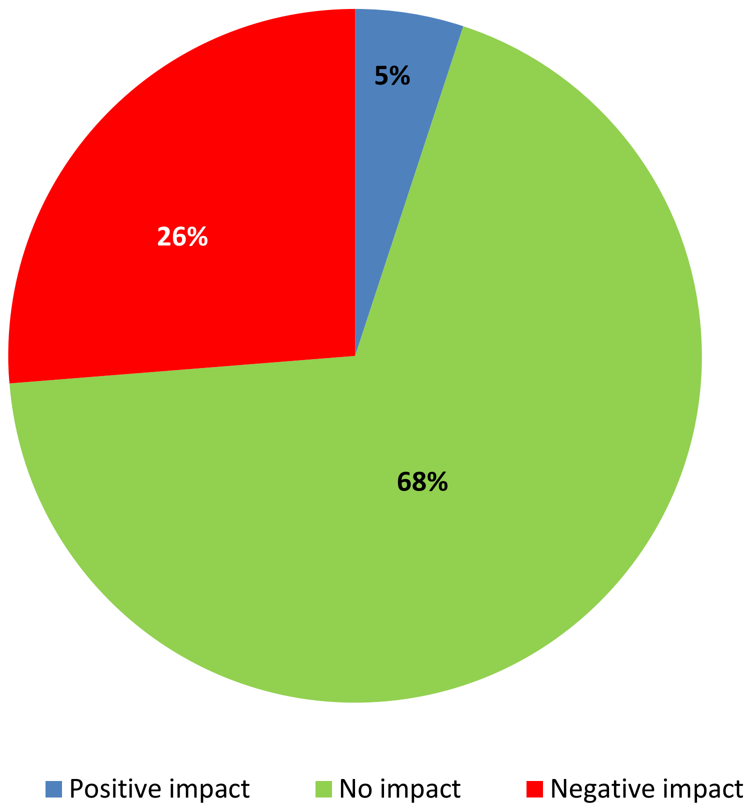
July 2014

Impact of changes to school regulations around term-time holiday taking

Impact on business levels of changes to school regulations about term-time holiday taking

Business were asked for the first time during the July survey what impact, if any, the recent changes to the school regulations around removing children from school for a holiday during term time were having on their business.

68% of businesses said the changes were having no impact and a further 5% that the changes had resulted in positive impacts for their business. Around a quarter of businesses (26%) said the changes were impacting negatively on their business.



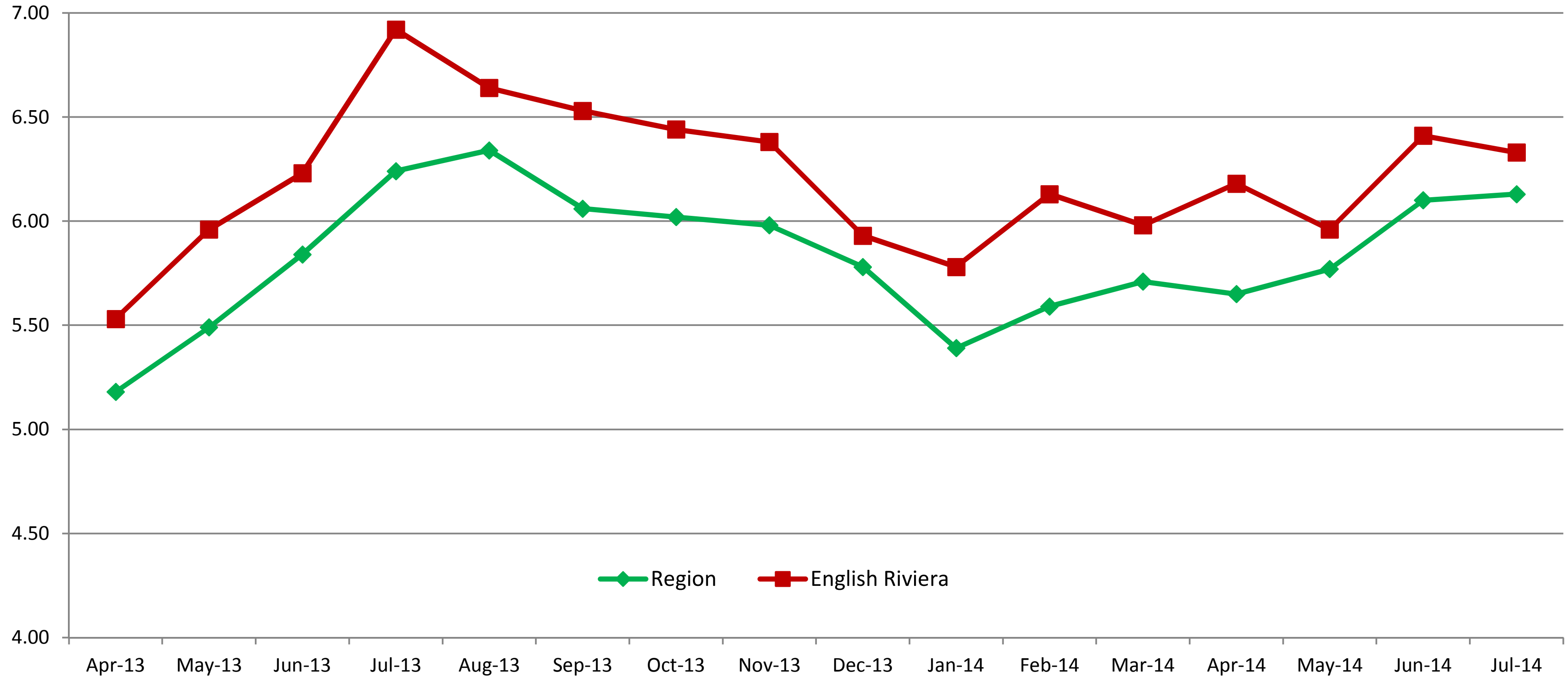
English Riviera Tourism Monitor

July 2014

Business Optimism

Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.33 for July 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. This is a slight decrease compared with the optimism score recorded last month (6.41) but remains the second highest score recorded since November 2013 and higher than the South West regional score for July 2014 of 6.13



Optimism	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	May-14	Jun-14	Jul-14
English Riviera	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	5.96	6.41	6.33
Region	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	5.77	6.10	6.13

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 42% of all respondents provided additional comments this month covering a variety of themes although the recent announcement of proposed funding cuts by the council on the English Riviera features highly.

The attempt by Gordon Oliver to destroy the ERTC will have a massively negative impact on tourism. The ERTC has performed everything that was expected of it plus much, much more. It had every right to expect to be left alone from political interference.

Not current levels but worrying for 2015 and beyond: The plans by the Mayor to slaughter "The goose that lays the Golden Eggs" (ERTC) will be devastating for the whole area (and not only tourism).

Again as last year the good spell of weather during July has played a major part in attracting visitor numbers.

The Mayor needs to realise that cutting the funding to tourism will encourage visitors to go elsewhere, and probably shorten his term in office !!!!!

Our business this season has been exceptional, we have had the best year ever, keep up the good work guys.

Basic council services including emptying bins, street cleaning, lighting, grass cutting, street furniture, maintenance are being constantly trimmed back. Weed killing and moss clearing in Brixham is not to take place until September. The council need to remember that tourism is a major contributor to jobs and investment and ultimately local taxes. If we don't provide a nice environment for people to visit then they will not come back, businesses will close, income and tax revenue will decrease we will struggle to attract newer businesses to the Bay and we will become a dinosaur.

When will the Mayor realise that cutting support for the Bay's leading industrial sector is short-sighted, damaging and harmful not just to the tourist economy but to all aspects of life in Bay.

It is imperative that the ERTC should be properly funded to promote the Bay on both the national and international stage.

Business Optimism

Shorter school holidays and disallowing people to take in-term holidays. Travel lodge and premier inns. Road works!!

The proposed cut to the subsidy from Torbay Council will undoubtedly have a negative impact on the ERTC and the marketing of the Bay. The proposed combined tourism and retail BID worries us greatly in that if a combined BID goes ahead it needs to be carefully managed given that tourism and retail will have very different needs from a BID.

We are very worried about the lack of support from the mayor for the ERTC and the small accommodation providers in the area.

We have grave concerns about the elected mayor's support for tourism in the bay.

Threat posed by funding cuts.

The less support that the existing tourist business gets from the council in terms of lifeguards and basic facilities and the more we have to deal with car parks like those at Meadfoot being hardly available and parking attendants being zealous the less that visitors feel welcome in Torbay.

I am extremely concerned at the Mayor's under hand decision to cut our major destination marketing arm for the bay at a time when we are coming out of a recession and others major resorts have councils committed to being part of the funding solution. Shame on him.

We must strive to work together better, Council, tourism and town centres.

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