

English Riviera Tourism Monitor



June 2014

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

August 2014



Executive Summary

Compared to June 2013 businesses reported that:

June 2014 Visitor levels:

Increased 35% / Stayed the same 26% / Decreased 39%

Estimated actual change in visitors 0%

June 2014 Turnover levels:

Increased 37% / Stayed the same 25% / Decreased 37%

Estimated actual change in turnover 0%

June 2014 Profitability was:

Higher 22% / Stayed the same 47% / Decreased 31%

July 2014 Outlook is:

Better 30% / Same as last year 22% / Not as good 48%

School summer holidays 2014 Outlook is:

Better 30% / Same as last year 22% / Not as good 48%

Optimism

Optimism score is 6.41 out of a possible 10

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English Riviera Tourism Monitor



June 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.

English Riviera Tourism Monitor

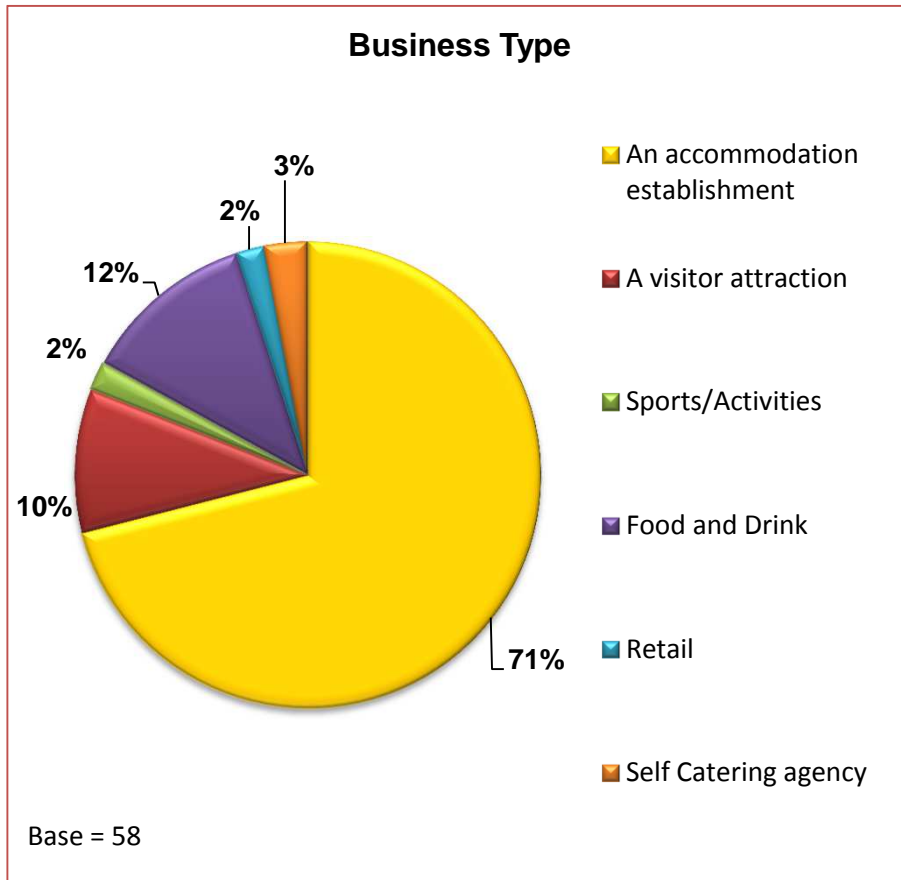
June 2014

Sample Profile

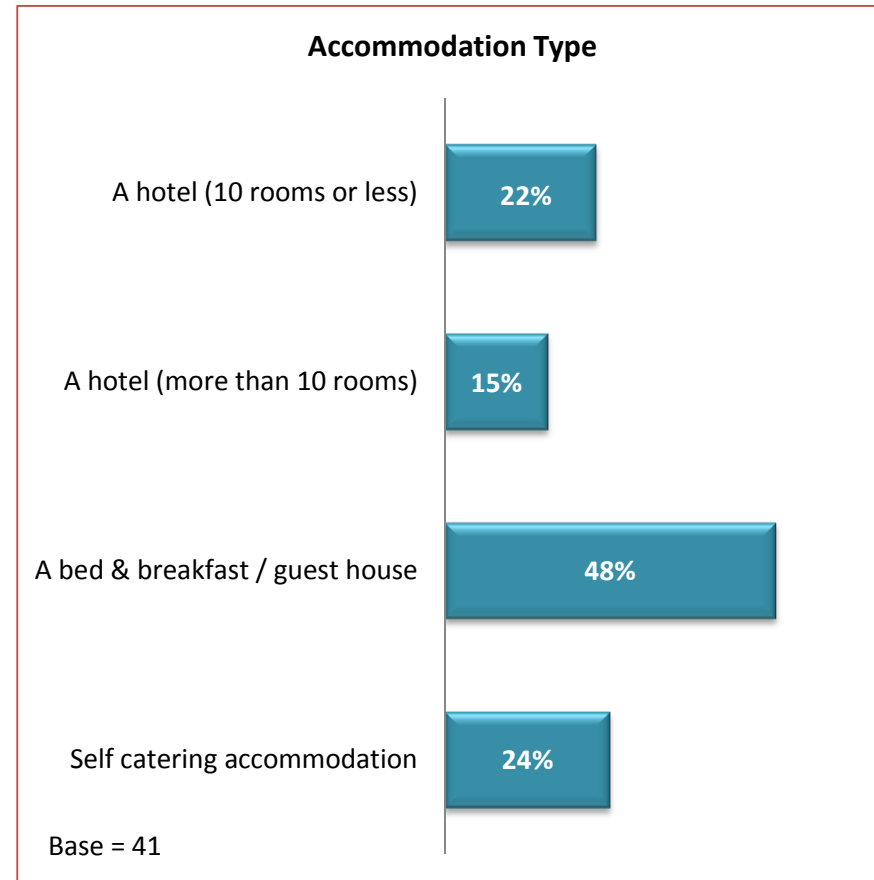
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Business Type

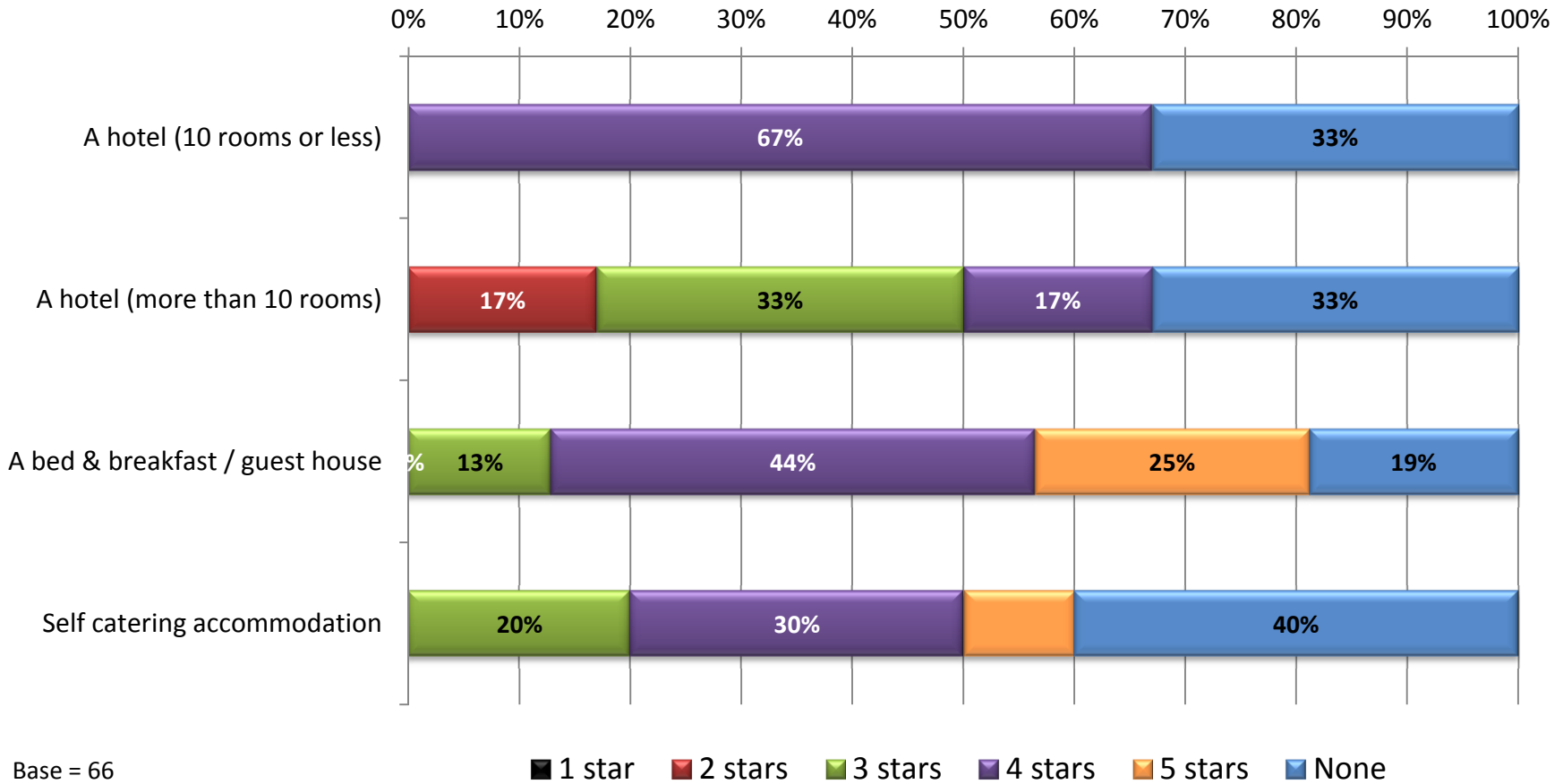


Accommodation providers accounted for 71% of responses, Visitor Attractions 10% and Food & Drink establishments 12%.



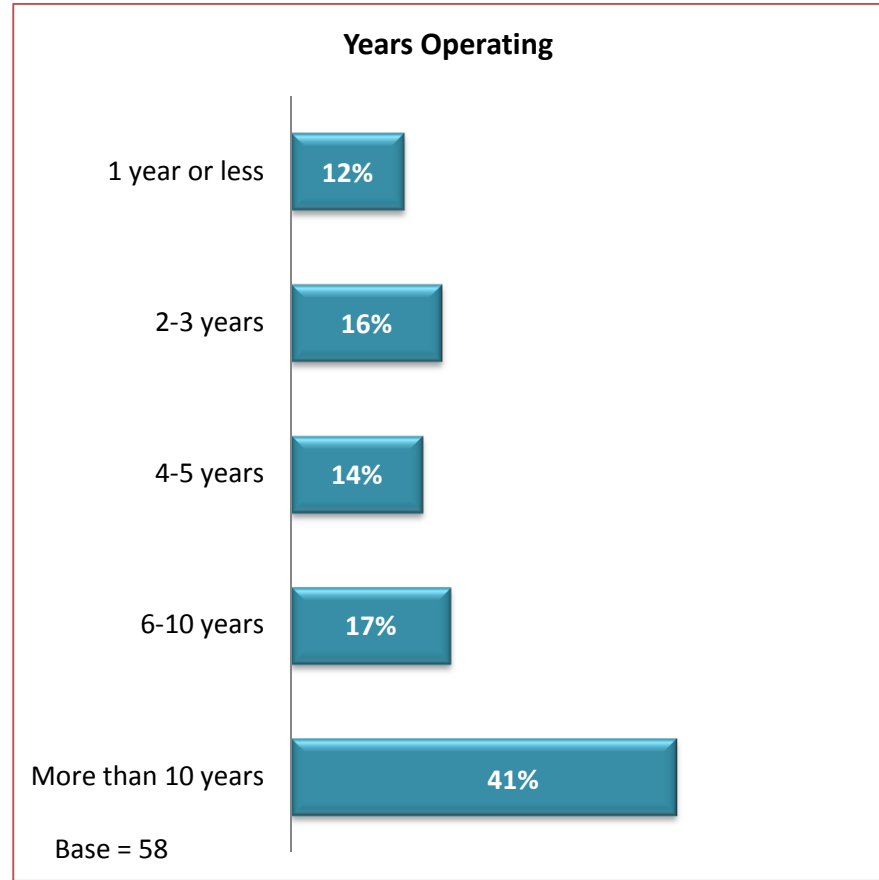
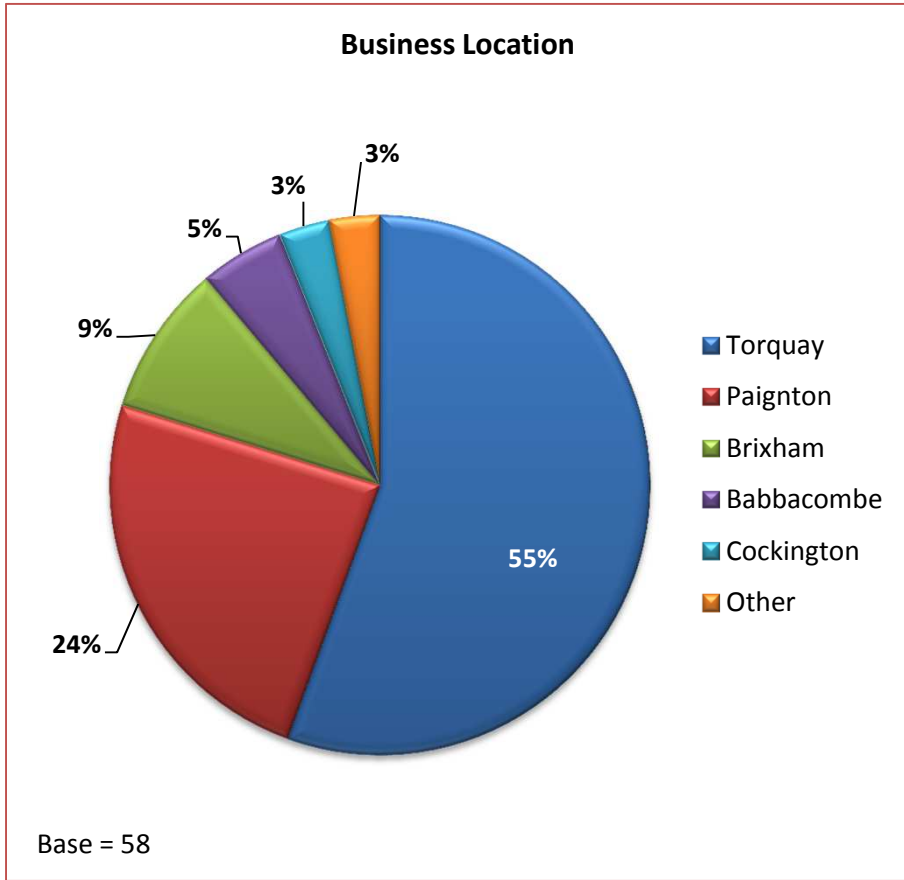
Serviced accommodation providers accounted for 76% of accommodation responses.

Accommodation Type and Rating



40% of self catering businesses, a third (33%) of both hotels with more than 10 rooms and hotels with 10 rooms or less and 19% of bed & breakfast/guest house businesses responding to the survey were not quality graded.

Business Location and Years Operating



Torquay businesses accounted for 53% of responses with 24% from Paignton. A further 9% of businesses were from Brixham, 5% from Babbacombe and 3% from Cockington. 3% of businesses were based elsewhere in the resort.

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

English Riviera Tourism Monitor



June 2014

The Month in Context

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June 2014 – The Month in Context

UK Weather

Temperatures for June were above average across the UK, with warm days and mild nights, although there were no spells of exceptional warmth. It was rather unsettled early and late in the month, with localised thundery downpours on several days, but there was a period of fine anticyclonic weather around the middle of the month, bringing plenty of warm, dry, sunny weather.

The provisional UK mean temperature was 14.2 °C, which is 1.2 °C above the 1981-2010 long-term average. This ranks as the equal-9th warmest June in a series since 1910. Rainfall was rather below average overall, particularly across the far south-east, north-west England and western Scotland, but slightly above average in parts of southern England and eastern Scotland. The UK overall received 76% of average rainfall. The UK received 109% of average sunshine hours, but the south and west fared much better than northern and eastern areas.

Weather impacts

Heavy thundery downpours caused some localised flooding during both the early and latter parts of the month. Flash flooding affected the Nottingham area on the 9th, while on 13th to 14th lightning strikes caused disruption at Gatwick Airport and left several hundreds of homes without power in the Thames Valley.

In the last week there were again numerous instances of heavy showers and localised flooding, for example at Skegness on 24th when around 30 mm fell within around an hour, causing flash-flooding to several homes and businesses. The stages at Glastonbury Festival were temporarily closed on 27th due to lightning, and there were various other instances of lightning damage during the month, mainly across England and Wales south of a line from Anglesey to the Wash. High pollen levels associated with the dry, warm weather in England and Wales around mid-month caused problems for hay-fever sufferers, with a surge in patient numbers visiting GPs.

June 2014 – The Month in Context

The UK Economy

UK economic growth in the first quarter was helped by the fastest expansion in business investment in two years, official figures have shown. Business investment grew by 5% in the first three months of this year, almost double an earlier estimate of 2.7%. But the Office of National Statistics kept its estimate for economic growth in the quarter unchanged at 0.8%. Business investment is one of the factors used to assess the amount of "spare capacity" in the economy.

In February the Bank of England estimated there was between 1% and 1.5% of spare capacity in the economy. Spare capacity most often stems from underinvestment by businesses. It is the Bank of England's way of gauging how far GDP is below its potential growth, and is also used by the Bank as one way of assessing when to raise interest rates. The ONS said business investment contributed 0.4% of the 0.8% of growth in the economy in the first three months of 2014. The annual growth rate for the UK economy was revised down slightly to 3% from 3.1%. But despite the slight downward revision this was still the strongest since 2007. Separately, the ONS said the UK's dominant services sector grew by 0.3% in April following a rise of 0.5% in March.

Most economists had expected the quarterly figure to remain unchanged, although some forecast a small rise to 0.9% after a second estimate of growth in the construction sector showed it expanded by 1.5% compared with an original 0.6% estimate. The UK economy remained 0.6% smaller than before the start of the financial crisis in the first quarter of 2014, but looks set to surpass its pre-crisis peak in the current quarter. Recent data and surveys point to a further strengthening of growth in the second quarter, with the Bank of England forecasting a 3.4% growth this year.

June 2014 – The Month in Context

Bank governor Mark Carney said the economy was showing more momentum than the central bank had expected, and raised the possibility of an interest rate later this year if wage growth picks up and growth does not slow down. Mr Carney told BBC Radio 4's Today programme the timing of any interest rate rise was less important than where they settled in the medium term. He suggested that level the "new normal" for rates would be about 2.5% by the beginning of 2017.

Howard Archer, chief UK and European economist at IHS Global Insight said: "The best news in the GDP data was the marked upward revision to business investment. "This not only indicates that growth is becoming less centred on consumer spending but could also have positive implications for future productivity growth."

David Tinsley, UK economist at BNP Paribas, said the figures held few surprises, but added the increase in business investment suggested the UK recovery was "looking increasingly broadly balanced".

English Riviera Tourism Monitor

June 2014

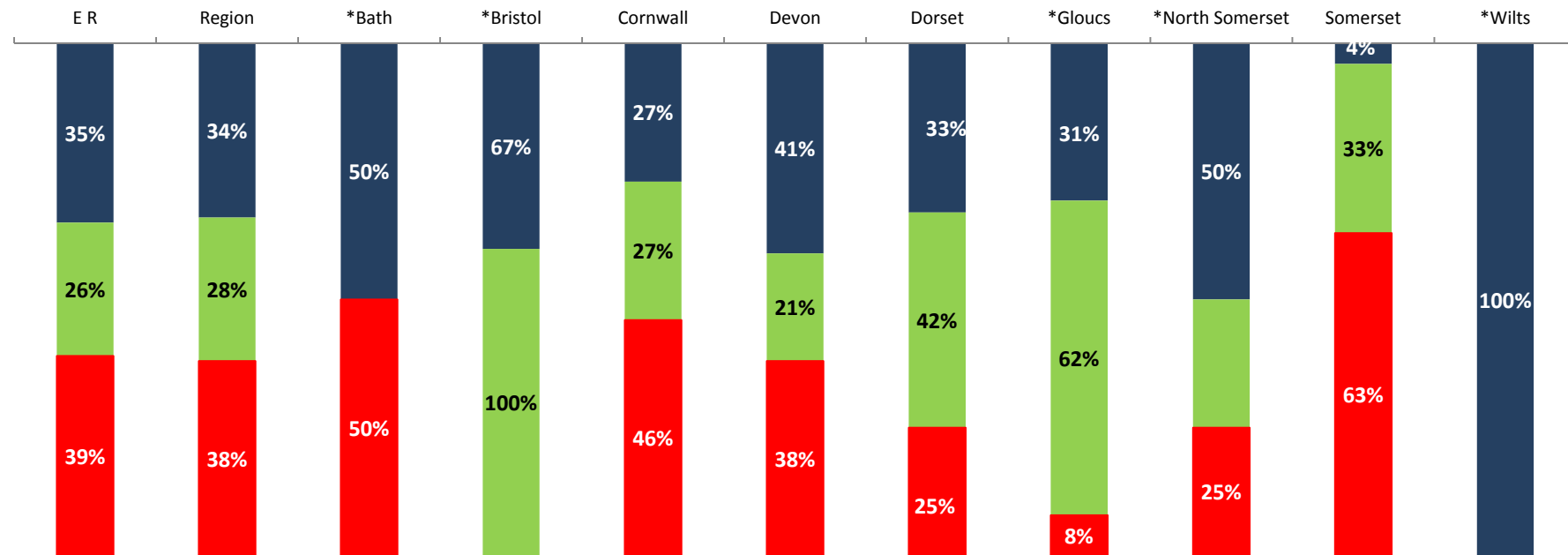
Performance

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Performance – Visitor Numbers (2014-2013)

61% of English Riviera businesses reported that their visitor numbers had increased (35%) or remained level (26%) compared with June 2013 – a similar proportion when compared with the region as a whole during the same period (62%). 39% of businesses indicated that their visitor numbers had decreased compared with the same time last year (38% regionally).



* Sample less than 20

■ Increased ■ Stayed the same ■ Decreased

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	35%	34%	50%	-	67%	27%	41%	33%	31%	50%	4%	100%
Stayed the same	26%	28%	-	-	100%	27%	21%	42%	62%	25%	33%	-
Decreased	39%	38%	50%	-	-	46%	38%	25%	8%	25%	63%	-
Base	54	184	4	-	3	26	81	24	13	4	24	4

Performance – Estimated occupancy levels June 2014

The slides to follow show the estimated occupancy for June 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		
June-14	% RM OCCUPANCY	SAMPLE
English Riviera	73.97%	27
All hotels	77.30%	13
Hotel 10 rooms or less	25.30%	8
Hotel more than 10 rooms	83.44%	5
B&B	46.33%	<5
Guest House	55.04%	10
Torquay	76.09%	16
Paignton	65.65%	6
Brixham	72.92%	<5
Babbacombe	30.24%	<5
**Cockington	0.00%	0
Other English Riviera	90.00%	<5
Devon	73.97%	35
South West	75.60%	64

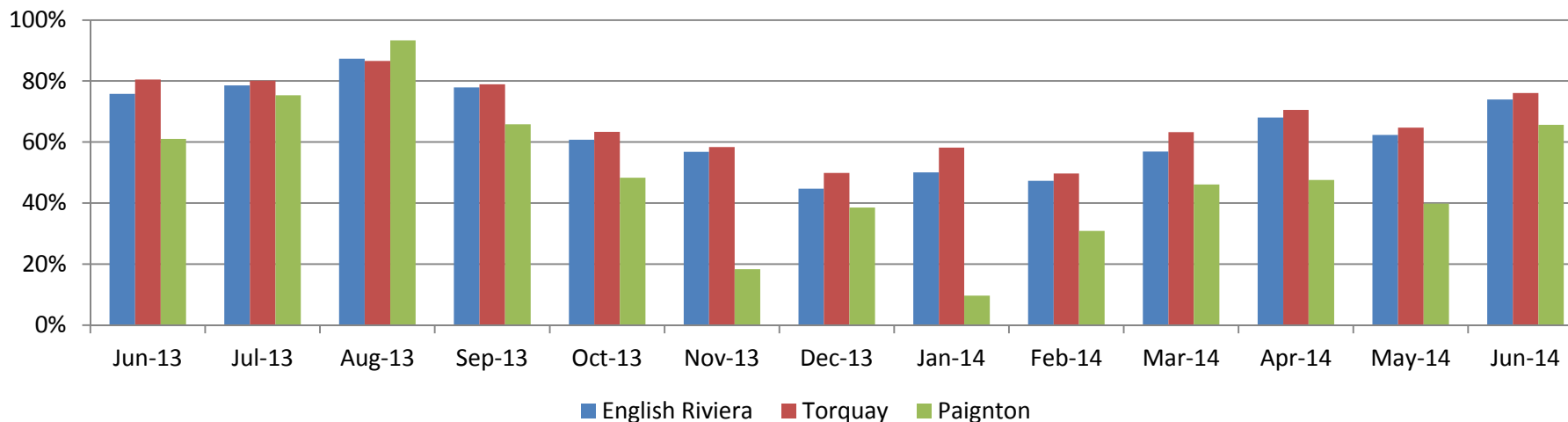
English Riviera serviced room occupancy was calculated at 73.97% for June 2014 compared with an average of 75.60% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for June 2014 was calculated at 69.64% compared with 47.15% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY		
June-14	% UNIT OCC	SAMPLE
English Riviera	69.64%	9
Self-catering accommodation	69.64%	9
Holiday Park	0.00%	0
Torquay	59.87%	5
Paignton	78.85%	<5
Brixham	0.00%	<5
Babbacombe	0.00%	0
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	63.96%	17
South West	47.15%	53

**Cockington data added to Torquay due to small sample

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



SERVICED ROOM OCCUPANCY	June-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14
English Riviera	75.79%	78.61%	87.34%	77.96%	60.75%	56.83%	44.72%	50.07%	47.32%	56.90%	68.04%	62.36%	73.97%
Torquay	80.50%	80.10%	86.56%	78.96%	63.34%	58.40%	49.88%	58.22%	49.69%	63.22%	70.50%	64.72%	76.09%
Paignton	61.06%	75.31%	93.28%	65.84%	48.34%	18.32%	38.51%	9.63%	30.84%	46.09%	47.56%	39.8%	65.65%
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 June 2014 English Riviera serviced occupancy was higher than Cornwall and Somerset.

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 all months except June 2014.

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

Performance – Estimated serviced accommodation occupancy levels 2014 by type

Key comparisons;

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

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

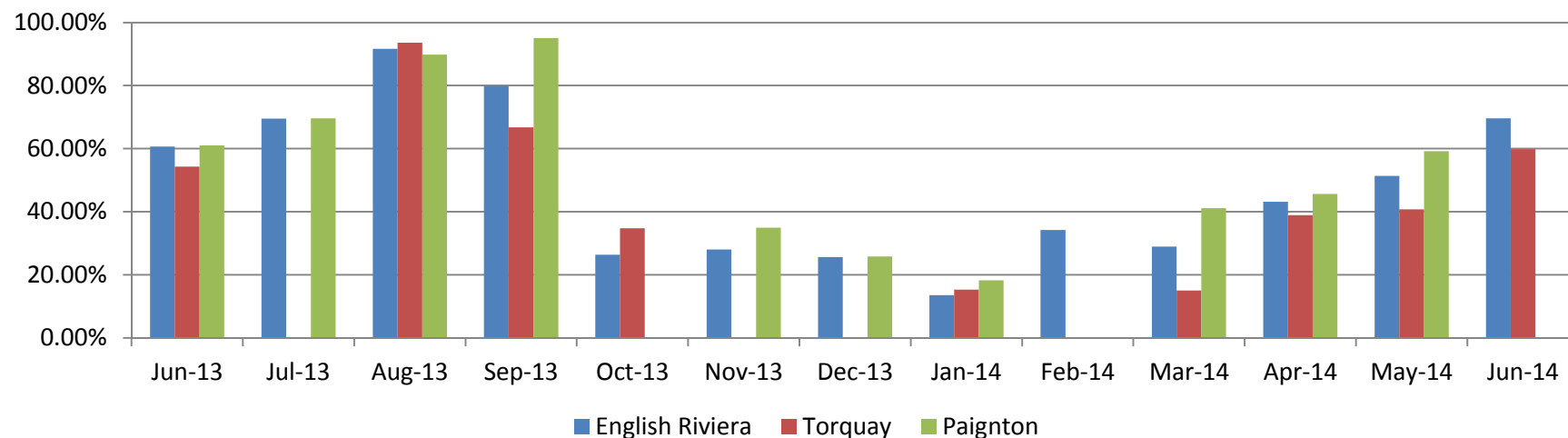
ER Hotels (more than 10 rooms) - Higher than the regional average during January, April May and June 2014.

ER B&B/Guest House – Lower than the regional average in all months.

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

* Sample size less than 5

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



SELF-CATERING UNIT OCCUPANCY	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
All ER Self-catering	60.65%	69.57%	91.68%	79.96%	26.37%	28.01%	25.64%	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%
Torquay	54.34%	*	93.62%	66.74%	34.79%	*	*	15.30%	*	15.00%	38.92%	40.78%	59.87%
Paignton	61.05%	69.66%	89.78%	95.12%	*	34.90%	25.76%	18.22%	*	41.09%	45.67%	59.19%	*
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 June 2014 English Riviera self-catering unit occupancy was higher than all comparison areas.

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.

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

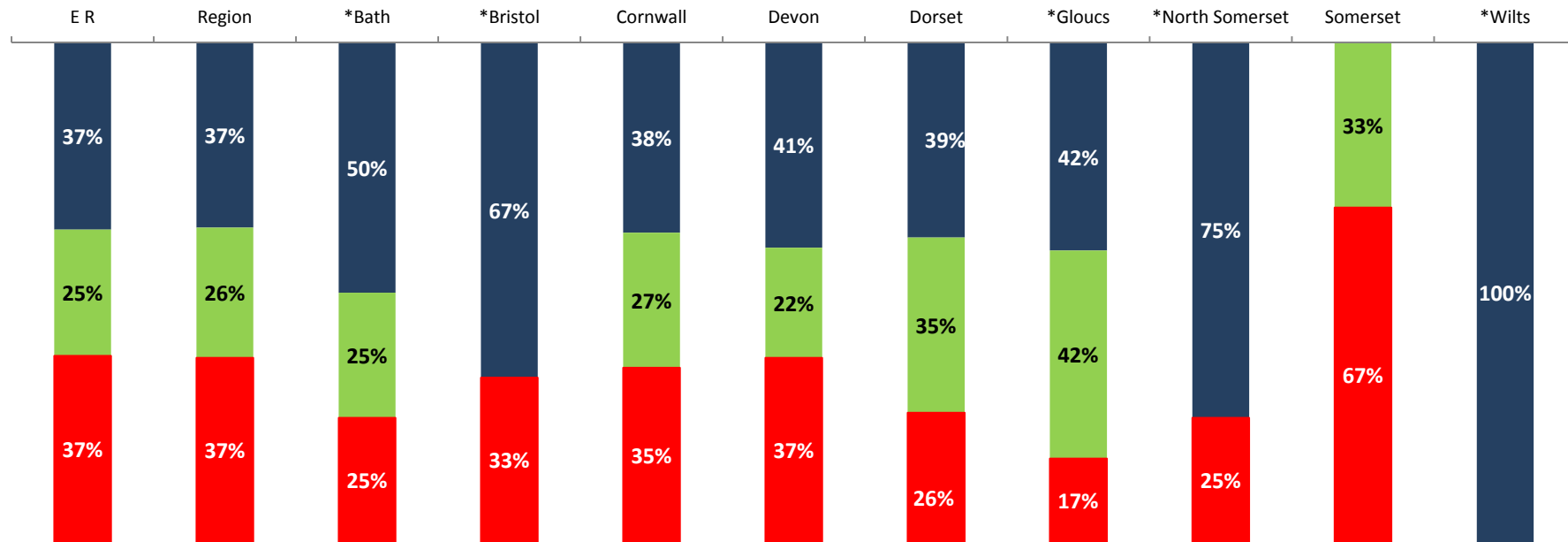
ER Self-catering (not including Holiday Parks) – Higher than the regional average in February, March, May and June 2014.

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

* Sample size less than 5

Performance – Turnover (2014-2013)

62% of English Riviera businesses reported increased (37%) or level turnover (25%) during June 2014 compared with June 2013, a similar proportion when compared with the region as a whole during the same period (63%). 37% of English Riviera businesses reported decreased turnover during June 2014, the same proportion as the region as a whole.



* Sample less than 20

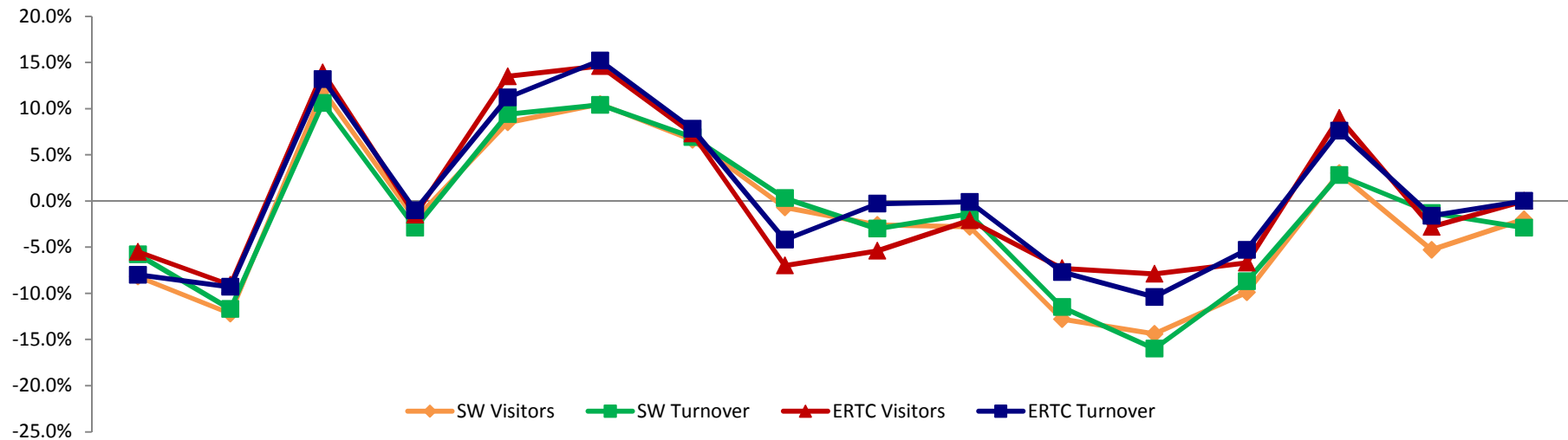
■ Increased ■ Stayed the same ■ Decreased

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	37%	37%	50%	-	67%	38%	41%	39%	42%	75%	-	100%
Stayed the same	25%	26%	25%	-	-	27%	22%	35%	42%	-	33%	-
Decreased	37%	37%	25%	-	33%	35%	37%	26%	17%	25%	67%	-
Base	51	179	4	-	3	26	78	23	12	4	24	4

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 June 2014 English Riviera businesses reported no change in terms of visitors and turnover compared with June 2013 which compares favourably against the regional average decreases of -2.0% and -2.9% in terms of visitors and turnover during the same period.

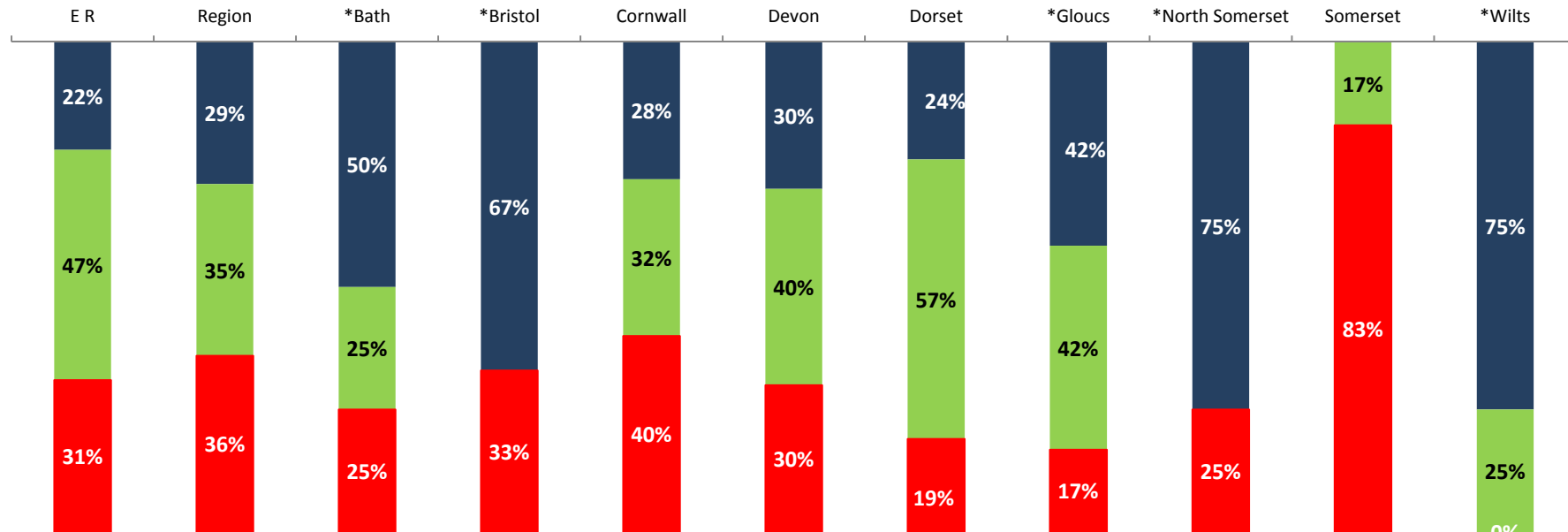
ERTC	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14
Visitors	-5.5%	-9.1%	13.9%	-1.5%	13.5%	14.6%	7.3%	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%	9.0%	-2.8%	0.0%
Turnover	-8.0%	-9.3%	13.2%	-1.0%	11.2%	15.2%	7.8%	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%	7.6%	-1.6%	0.0%



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

Performance – Profitability (2014-2013)

69% of all English Riviera businesses reported increased (22%) or level profitability (47%) for the month, a larger proportion than the SW region as a whole during the same period (64%). 31% of businesses reported their profitability as being lower than during June 2013 (36% 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	22%	29%	50%	-	67%	28%	30%	24%	42%	75%	-	75%
Stayed the same	47%	35%	25%	-	-	32%	40%	57%	42%	-	17%	25%
Decreased	31%	36%	25%	-	33%	40%	30%	19%	17%	25%	83%	-
Base	45	167	4	-	3	25	70	21	12	4	23	4

English Riviera Tourism Monitor

June 2014

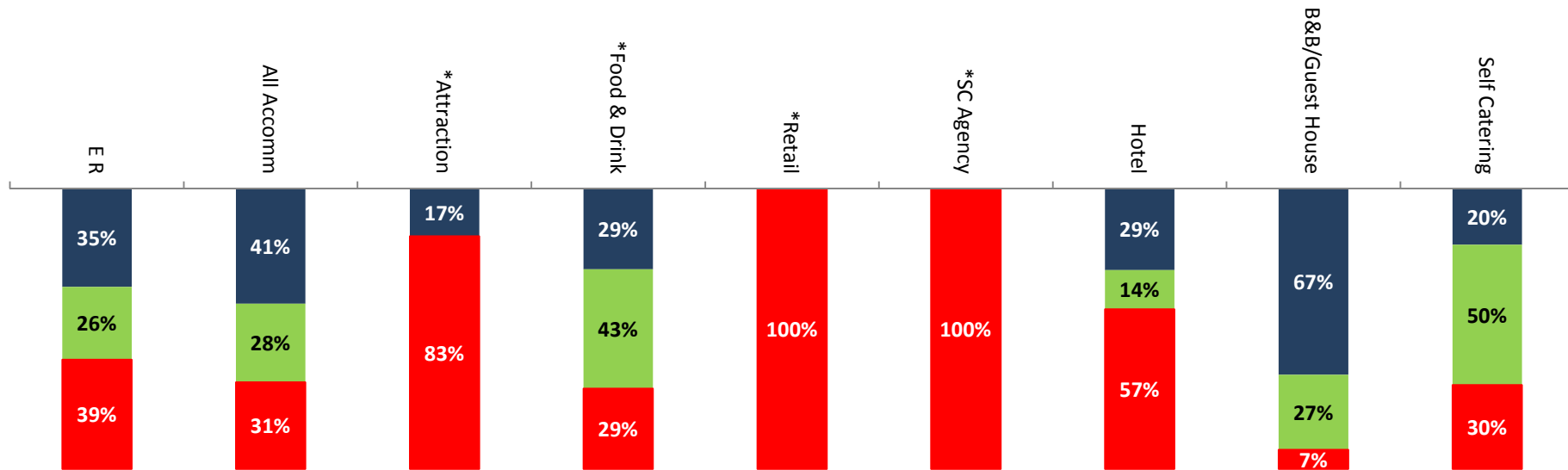
Business Type Performance

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Business Type Performance – Visitor numbers (2014-2013)

69% of all accommodation providers reported increased (41%) or level (28%) visitor numbers for June 2014. 94% of B&B/Guest Houses and 70% of Self Catering operators reported increased or level visitor numbers for June 2014 compared with the same time last year. 57% of Hotels reported decreased visitor numbers compared with the same time last year.



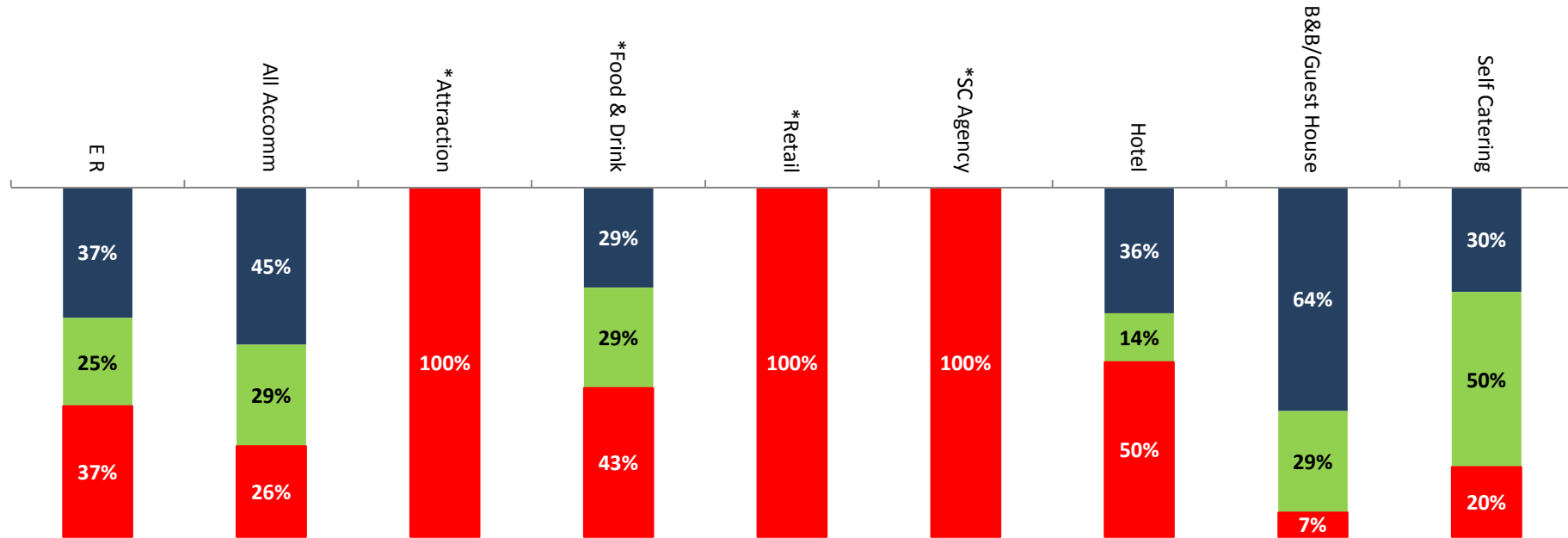
* Sample less than 10

■ 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	35%	41%	17%	-	29%	-	-	-	-	29%	67%	20%	-	-
Stayed the same	26%	28%	-	-	43%	-	-	-	-	14%	27%	50%	-	-
Decreased	39%	31%	83%	-	29%	100%	-	100%	-	57%	7%	30%	-	-
Base	54	39	6	-	7	<5	-	<5	-	14	15	10	-	-

Business Type Performance – Turnover (2014-2013)

74% of all accommodation providers reported increased (45%) or level turnover (29%) for June 2014. 93% of B&B/Guest Houses and 80% of Self Catering operators reported increased or level turnover for June 2014 compared with the same time last year. 50% of Hotels reported decreased turnover compared with the same time last year.



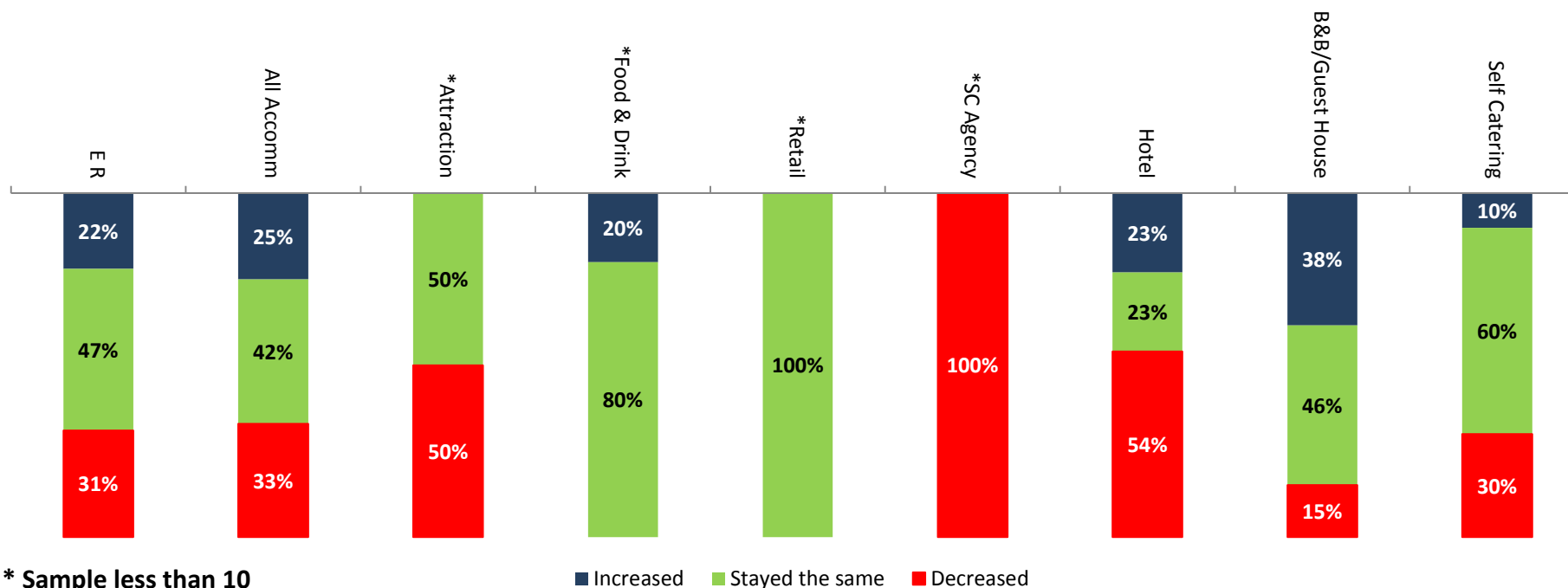
* Sample less than 10

■ 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	37%	45%	-	-	29%	-	-	-	-	36%	64%	30%	-	-
Stayed the same	25%	29%	-	-	29%	-	-	-	-	14%	29%	50%	-	-
Decreased	37%	26%	100%	-	43%	100%	-	100%	-	50%	7%	20%	-	-
Base	51	38	<5	-	7	<5	-	<5	-	14	14	10	-	-

Business Type Performance – Profitability (2014-2013)

67% of all accommodation providers reported increased (25%) or level (42%) profitability for June 2014. 84% of B&B/Guest Houses and 70% of Self Catering operators reported increased or level profitability for June 2014 compared with the same time last year. In contrast, 54% of Hotels reported decreased profitability compared with June 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	22%	25%	-	-	20%	-	-	-	-	23%	38%	10%	-	-
Stayed the same	47%	42%	50%	-	80%	100%	-	-	-	23%	46%	60%	-	-
Decreased	31%	33%	50%	-	-	-	-	100%	-	54%	15%	30%	-	-
Base	45	36	<5	-	5	<5	-	<5	-	13	13	10	-	-

English Riviera Tourism Monitor

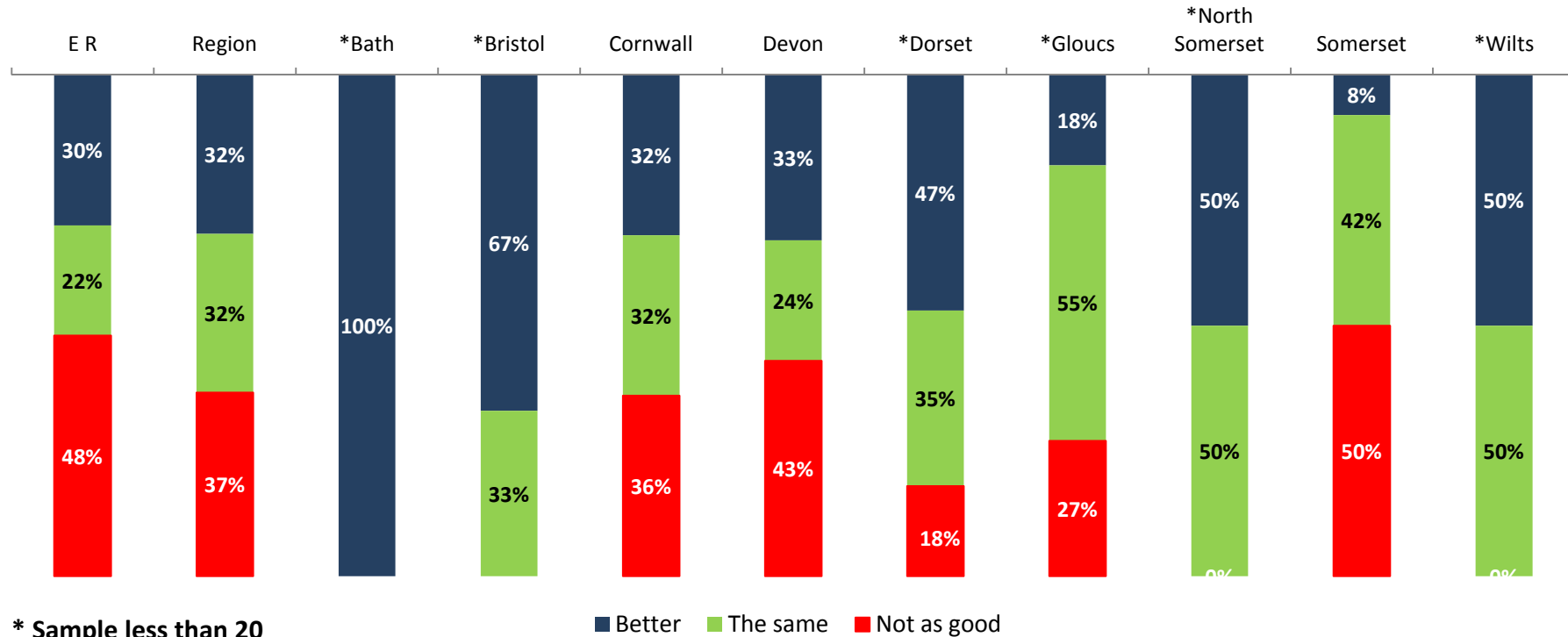
June 2014

Looking Ahead



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

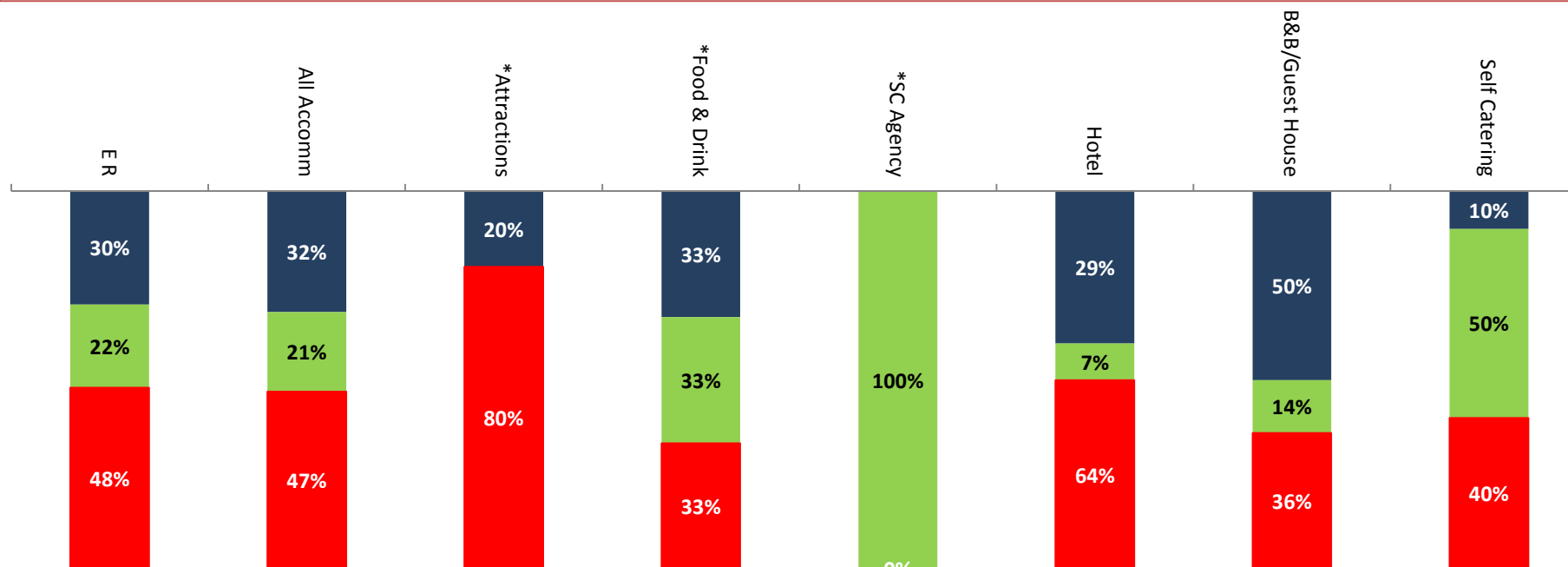
52% of English Riviera businesses reported that their booking levels for July 2014 were looking better than (30%) or the same as (22%) June 2013, compared with 64% of businesses within the region as a whole and 57% of businesses in Devon.



Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	30%	32%	100%	-	67%	32%	33%	47%	18%	50%	8%	50%
The same	22%	32%	-	-	33%	32%	24%	35%	55%	50%	42%	50%
Not as good	48%	37%	-	-	-	36%	43%	18%	27%	-	50%	-
Base	50	167	2	-	3	25	76	17	11	4	24	4

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

53% of all accommodation providers reported that their July 2014 booking levels were looking better than (32%) or the same as (21%) last year. 64% of B&B/Guest Houses and 60% of Self Catering operators reported that their booking levels for July 2014 were looking better than or the same as July 2013. In contrast, 64% of Hotels reported their booking levels as being lower than July 2013.



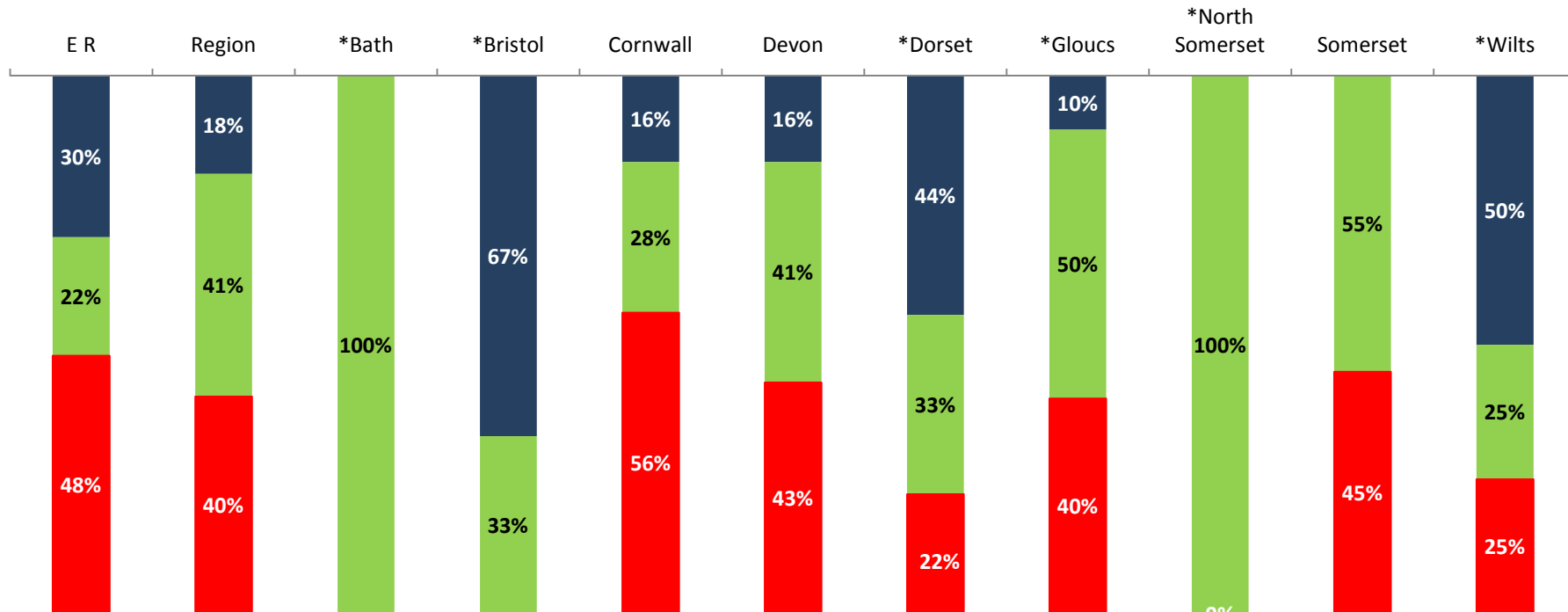
* Sample less than 10

■ 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	30%	32%	20%	-	33%	-	-	-	29%	50%	10%	-	-
Same	22%	21%	-	-	33%	-	100%	-	7%	14%	50%	-	-
Not as good	48%	47%	80%	-	33%	-	-	-	64%	36%	40%	-	-
Base	50	38	5	-	6	-	<5	-	14	14	10	-	-

Area Outlook – Booking Levels School summer holidays 2014 (2014 v 2013)

52% of all businesses reported that their school summer holidays booking levels were looking better (30%) or the same as (22%) in 2013 compared with 59% of businesses in the region as a whole and 57% within Devon.



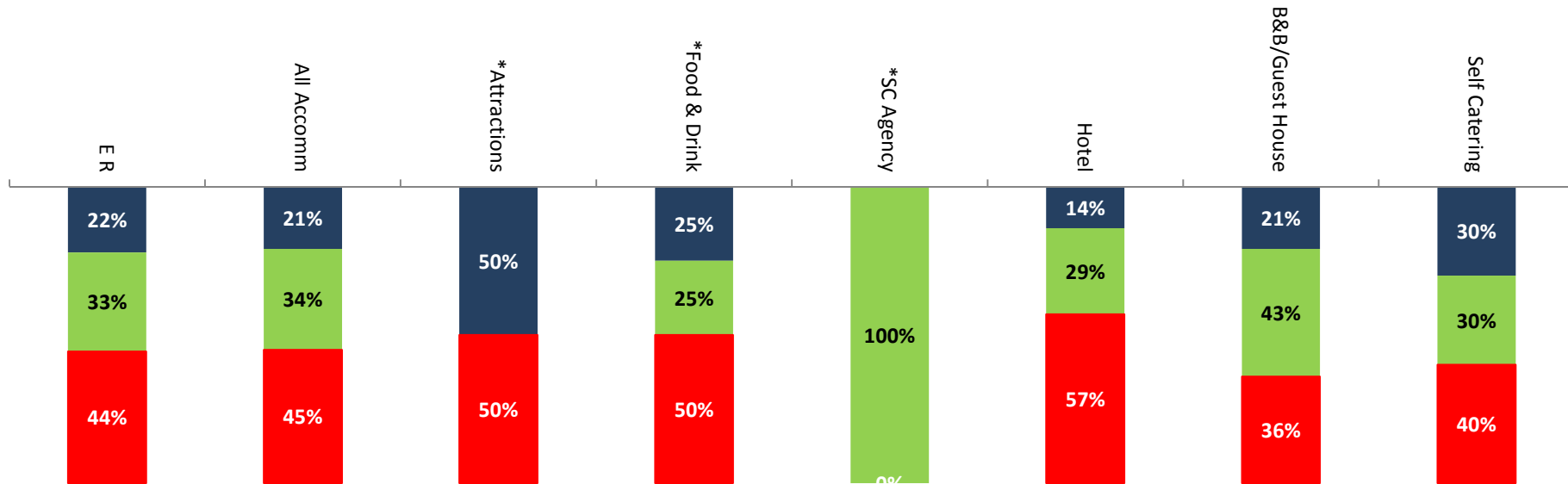
* Sample less than 20

■ Better ■ The same ■ Not as good

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	30%	18%	-	-	67%	16%	16%	44%	10%	-	-	50%
The same	22%	41%	100%	-	33%	28%	41%	33%	50%	100%	55%	25%
Not as good	48%	40%	-	-	-	56%	43%	22%	40%	-	45%	25%
Base	50	157	2	-	3	25	69	18	10	3	22	4

Business Type Outlook – Booking Levels School summer holidays 2014 (2014 v 2013)

55% of all accommodation providers reported that their school summer holidays 2014 booking levels were looking better than (21%) or the same as 2013 (34%) whilst 45% said that they were looking worse than 2013. 64% of B&B/Guest Houses and (60%) of Self Catering operators reported that their school summer holidays 2014 booking levels were looking better than or the same as 2013. 57% of Hotels reported that their booking levels were looking worse than 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	22%	21%	50%	-	25%	-	-	-	14%	21%	30%	-	-
Same	33%	34%	-	-	25%	-	100%	-	29%	43%	30%	-	-
Not as good	44%	45%	50%	-	50%	-	-	-	57%	36%	40%	-	-
Base	45	38	<5	-	<5	-	1	-	14	14	10	-	-

English Riviera Tourism Monitor

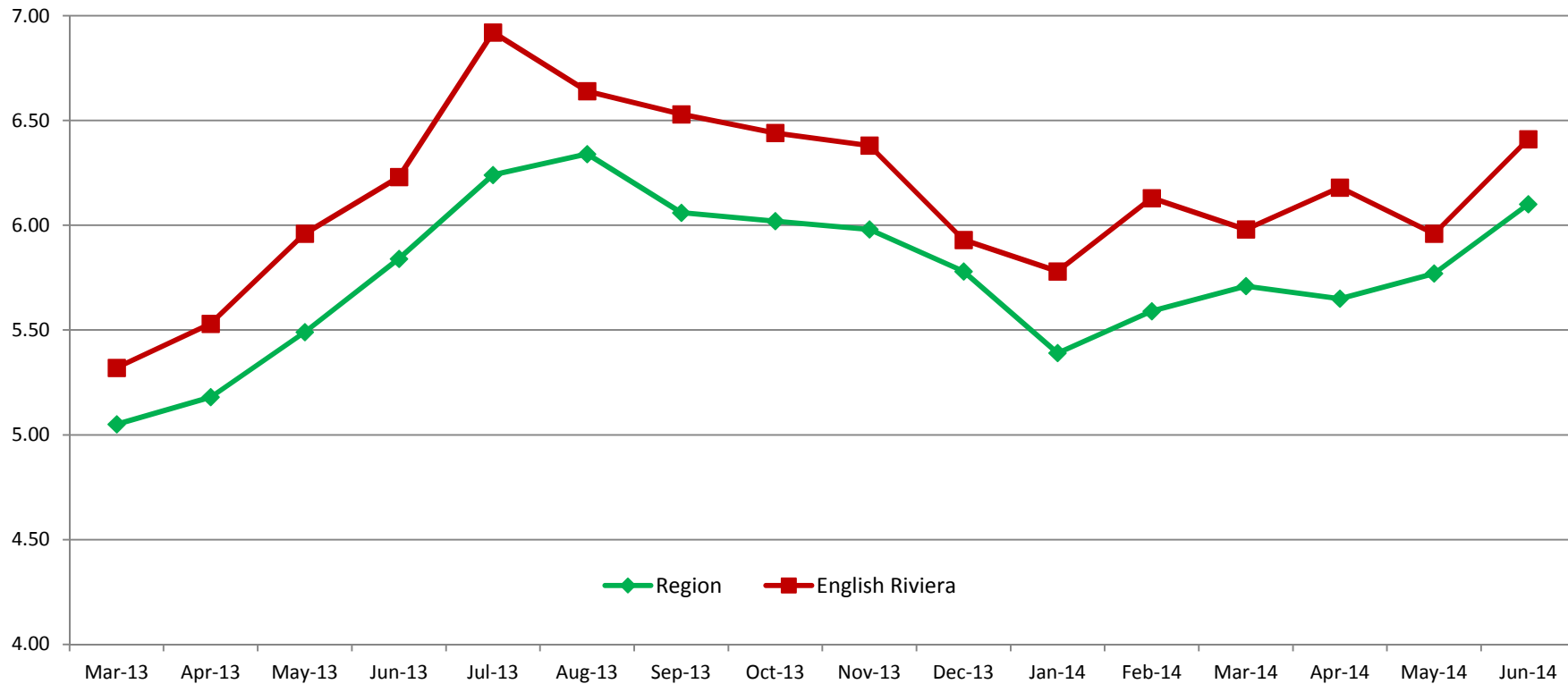
June 2014

Business Optimism



Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.41 for June 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. This is a significant increase compared with the optimism score recorded last month (5.96) and remains higher than the South West regional score for June 2014 of 6.10.



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

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 36% of all respondents provided additional comments this month covering a variety of themes although the upkeep of the local area features highly.

June was a very poor month for groups visits - impacted the visitor numbers. July on the other hand has been very good. May and June always need to be looked at jointly due the fact that the half term falls differently each year and is a busy week. So looking at those months together we are only 9% down on last year. (as opposed to 20% for June alone).

This year has been very odd. The year started well but July is considerably down on last year so far both in occupancy and rates. It might be factors such as the world cup. On a positive note our overseas visitors are at a record high.

Negative publicity for Torbay on beach seaweed cleaning in Daily Express was not great news

The lack of care to our public areas, gardens etc., repair of our lights, smelly drains, weeds and litter are all mentioned by our guests and many say Torbay is going 'down hill'.

Torquay town is a mess.....the street cleaning is non existent.... the main street needs cleaning each and every day first thing in the morning... it is the state of the town centre that people will remember about their visit to Torbay. Already visitors are saying it looks filthy... what chance do we have of them telling others something positive about the town or the chance of a return visit?? The streets need to be cleaner!!

We're experiencing high levels of cancellations, and fake credit card details, this is significantly higher than last year. Breaks this year are even shorter with anything above a 3 night stay a real rarity, increasing our costs per stay.

Still lots of good parking spaces, needlessly taken out of use in Torwood St (with demonstrable lack of justification) by the Council. This reduces visitors to the area, and hence footfall is lower than it could be.

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

