English Riviera Tourism Monitor

May 2014

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

July 2014

Executive Summary

Compared to May 2013 businesses reported that:

May 2014 Visitor levels:

Increased 31% / Stayed the same 24% / Decreased 46%

Estimated actual change in visitors -2.8%

May 2014 Turnover levels:

Increased 34% / Stayed the same 24% / Decreased 43%

Estimated actual change in turnover +-1.6%

May 2014 Profitability was:

Higher 20% / Stayed the same 36% / Decreased 43%

June 2014 Outlook is:

Better 23% / Same as last year 33% / Not as good 45%

School summer holidays 2014 Outlook is:

Better 5% / Same as last year 51% / Not as good 45%

Optimism

Optimism score is 5.96 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.

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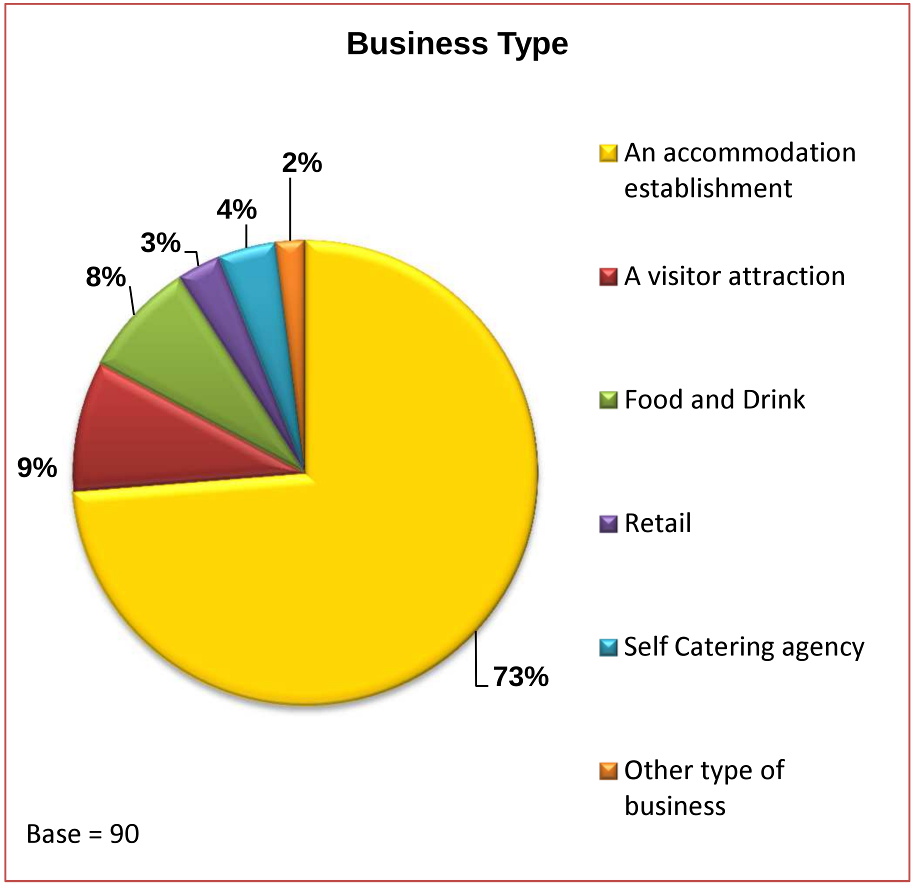
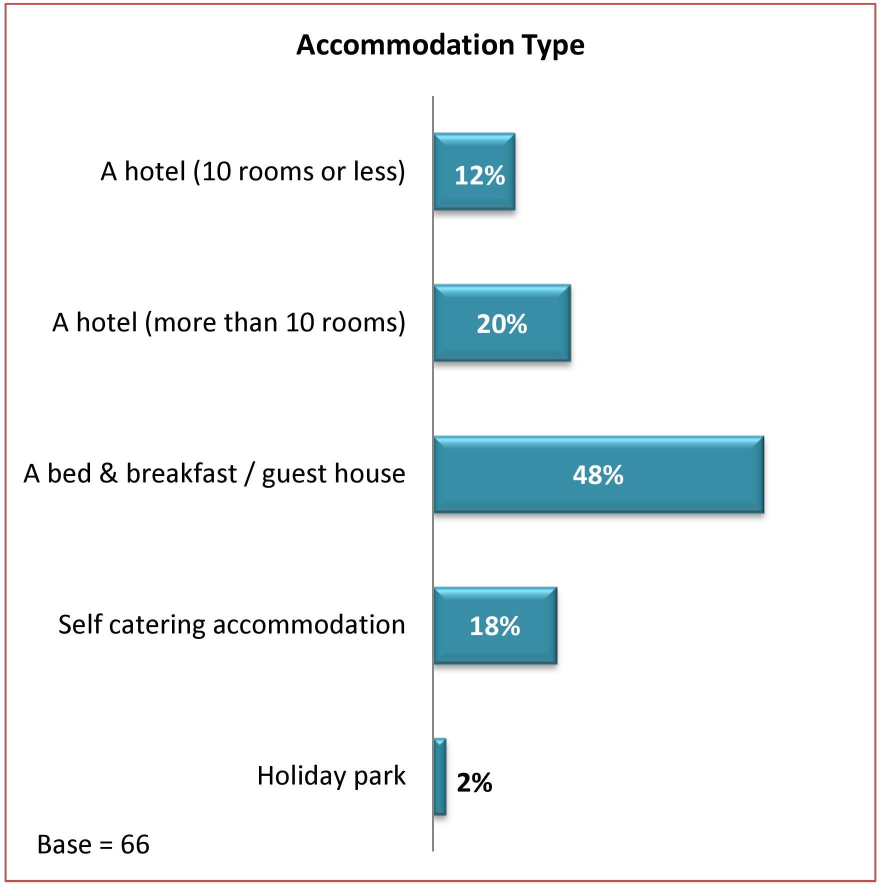
Sample Profile

Business Type

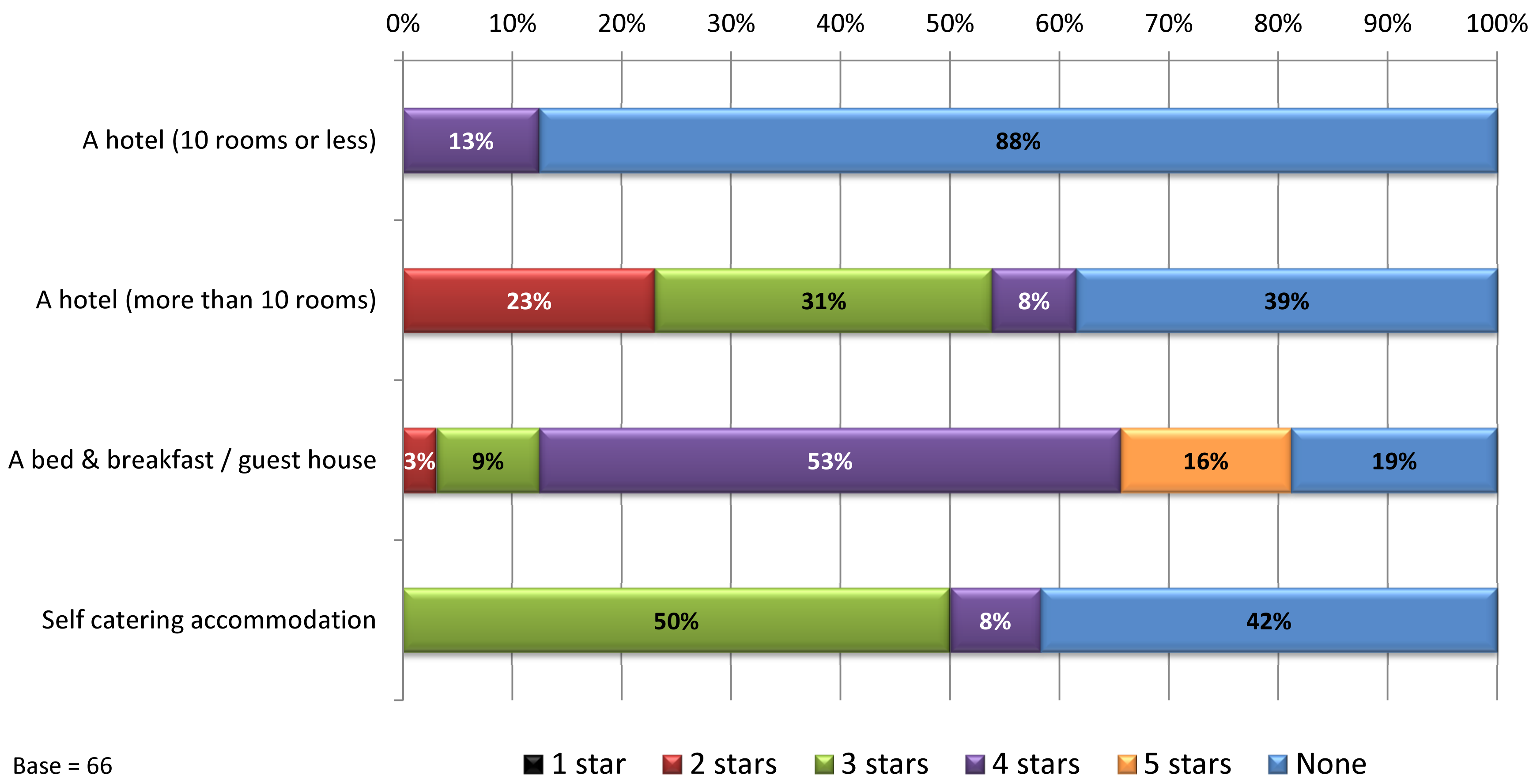




Accommodation providers account for 73% of responses, Visitor Attractions 9% and Food & Drink establishments 8%.

Serviced accommodation providers account for 80% of accommodation responses.

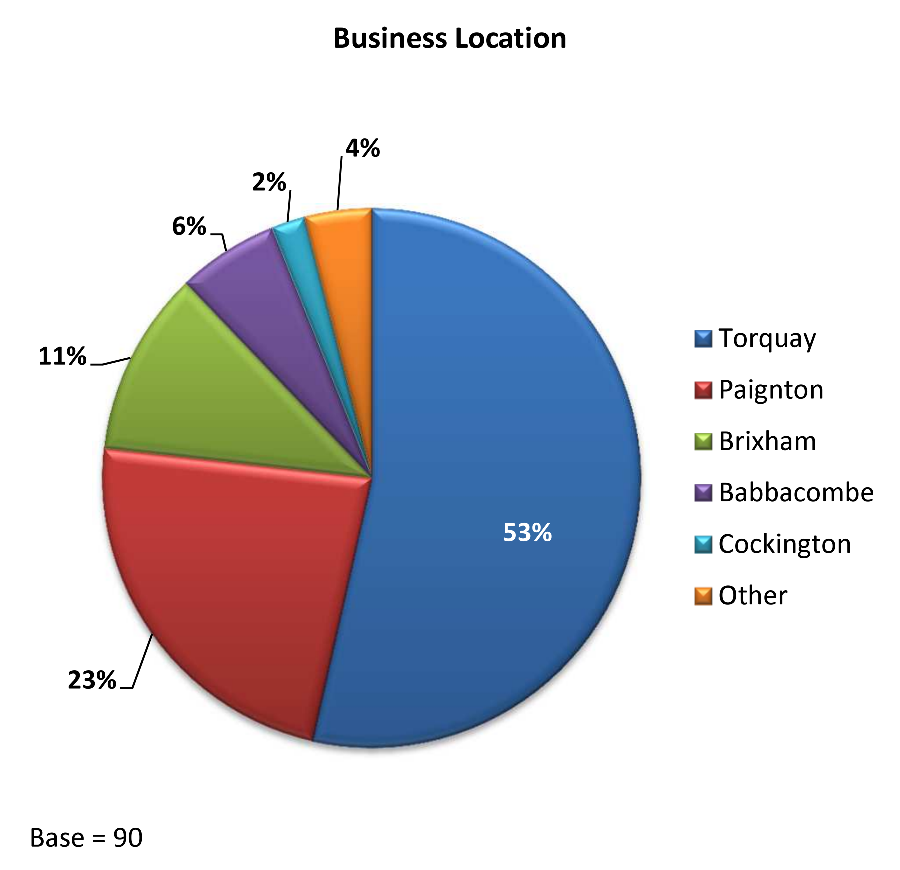
Accommodation Type and Rating

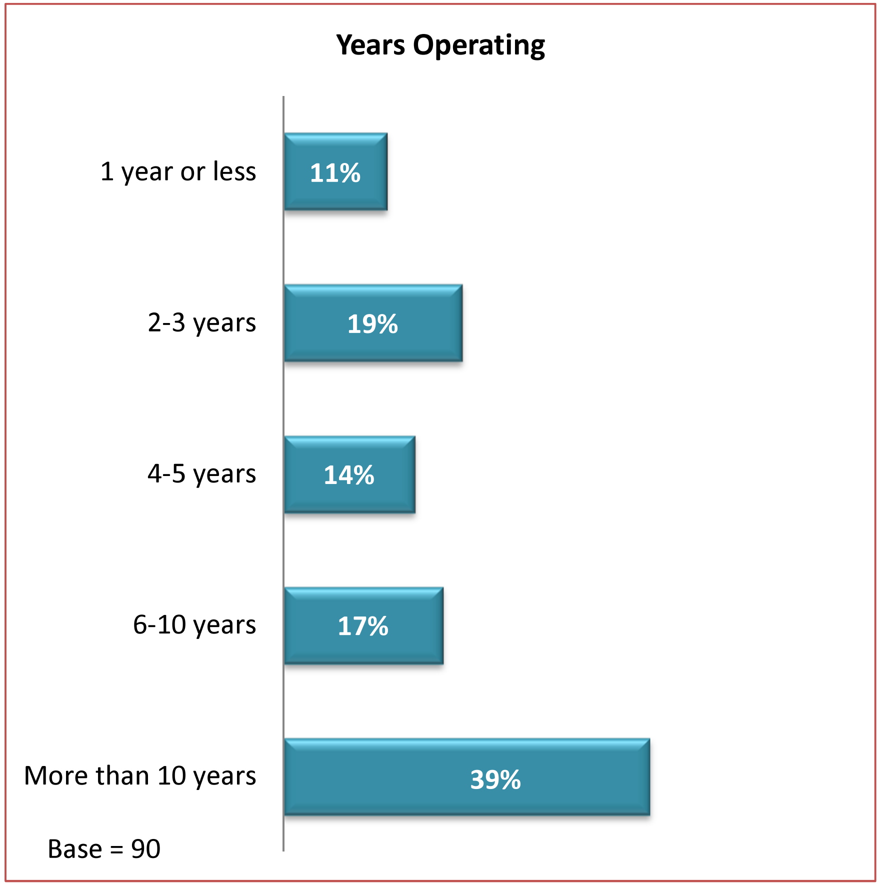


Base = 66

With the exception of Hotels with 10 rooms or less, the majority of businesses responding to this survey have a quality rating, although 42% of Self Catering accommodation providers, 39% of Hotels with more than 10 rooms and 19% of B&B/Guest Houses and are not graded.

Business Location and Years Operating





Torquay businesses account for 53% of responses with 23% from Paignton. A further 11% of businesses were from Brixham, 6% from Babbacombe and 2% from Cockington. 4% of businesses were based elsewhere in the resort.

56% of businesses have been operating for more than 6 years.

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The Month in Context

May 2014 – The Month in Context

The UK weather

May was another warmer than average month. There were some spells of dry and warm weather for many parts of the country early in the month, around the middle of the month and again right at the end, but these were interspersed with more unsettled conditions bringing cloud and rain. A low pressure system passing through on the weekend of 10th to 11th saw some unusually strong winds for the time of year along the south coast. The latter part of the month was less settled, often overcast, and brought abundant rainfall - some of it in the form of thundery showers - for many areas, most especially East Anglia and other eastern counties of England on 26th and 27th.

The UK mean temperature was 11.2 °C, which is 0.9 °C above the 1981-2010 long-term average. This was largely due to there being many mild nights, whereas daytime maximum temperatures were only a little above average. Rainfall was above average for many, with totals well above average in eastern counties of England and the far west of Scotland; north-east England provisionally had its wettest May since 1979. The UK overall received 143% of average rainfall. It was provisionally the dullest month in records from 1929 for both Northern Ireland and Western Scotland, and dull also across much of northern England and Wales. However, sunshine totals were closer to average in the south, resulting in 82% of average sunshine hours for the UK overall, making this the dullest May for the UK since 1991.

Weather impacts

There were several instances of heavy rainfall during the month, starting with heavy slow-moving downpours over parts of England on the 1st. An unusually windy spell over the weekend of 10th to 11th in many southern areas led to some local disruption on the roads of south Wales. Some northern areas received various instances of heavy rainfall from 18th onwards, and lightning damage was reported in Wales on the 21st. Some southern areas were also the subject of rainfall alerts from 23rd to 27th. Heavy rain over East Anglia moving into north-east England on 27th to 28th was notable for its amount and duration but saw few impacts.

Source: Met Office

May 2014 – The Month in Context

The UK economy

The UK economy is in good health according to two major business lobby groups, the CBI and the British Chambers of Commerce (BCC). The CBI says growth reached a record high in May, marking the best reading since it began gathering data in 2003. Meanwhile, the BCC upgraded its growth forecast for 2014 from 2.8% to 3.1%, which, if achieved, would be the highest rate since pre-crisis 2007. That figure is well above the 2.7% forecast by the OBR.

Latest official figures showed that the UK economy grew by 0.8% in the first three months of 2014. The CBI's growth report suggests the UK economy has continued to perform strongly in the second quarter of this year. Stronger economic performance was seen across the board, it said. Sectors including retail sales and professional and consumer services did well in the three months to May, while manufacturing output continued to grow at a "solid pace". Andrew Graham, the chief executive of wallpaper manufacturer Graham & Brown, told the BBC he was cautiously confident: "The economy is improving, but that is from a very low base. "I think we are just starting to see recovery. As a business, we have starting investing seriously again over the last 12 months."

CBI deputy director-general Katja Hall said the improvement was down to increased confidence in the UK economy, easier access to credit, and better global economic conditions. However, Ms Hall said there were risks to the UK's outlook from global developments, including the "possibility that the situation in Ukraine and Russia could impact on global commodity prices". She added: "With the eurozone crisis still far from being fully resolved, the UK continues to be exposed to a prolonged period of subdued activity in the region.“ The BCC also said the economic recovery was not guaranteed. John Longworth, the BCC's director general, said: "Our forecast confirms that Britain is leading, rather than following, other major economies when it comes to short-term growth, which is great news. "But make no mistake - we still have a lot of work to do.“ He added that the UK was "overly reliant on consumer spending" as a driver of growth.

Source: The BBC

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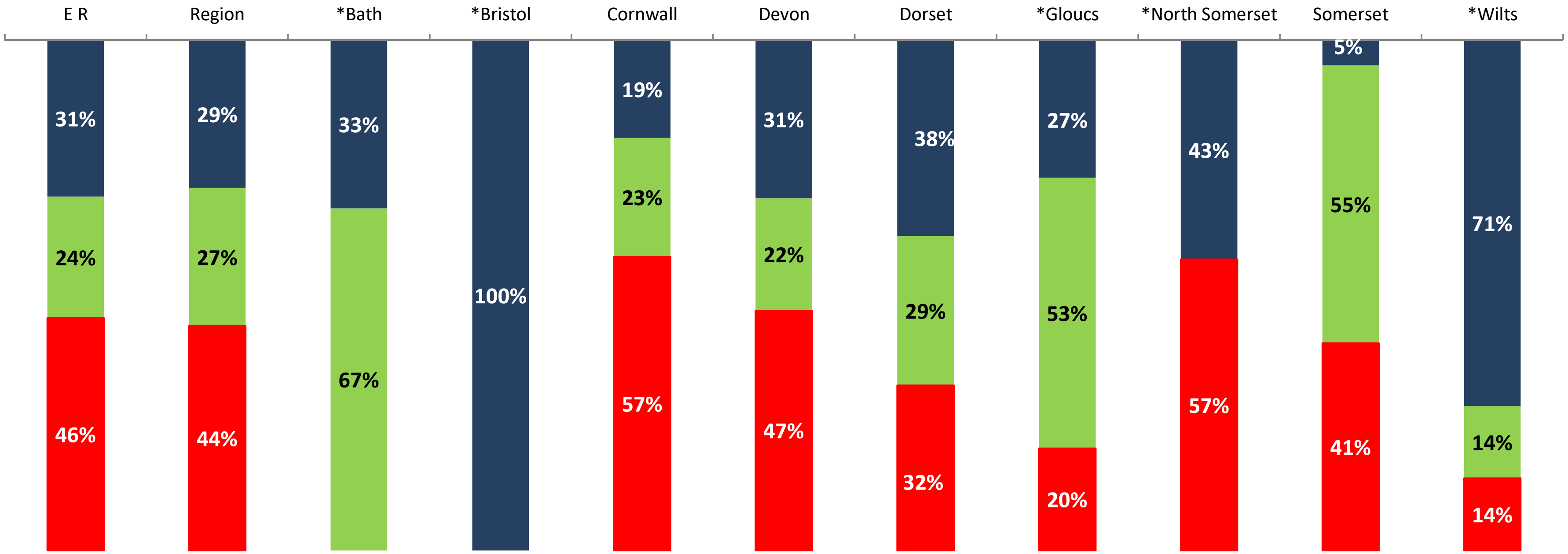
Performance

Performance – Visitor Numbers (2014-2013)

55% of English Riviera businesses reported that their visitor numbers had increased (31%) or remained level (24%) compared with May 2013 – a similar proportion when compared with the region as a whole during the same period (56%). 46% of businesses indicated that their visitor numbers had decreased compared with the same time last year (44% regionally).



*** Sample less than 20**

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	31%	29%	33%	-	100%	19%	31%	38%	27%	43%	5%	71%
Stayed the same	24%	27%	67%	-	-	23%	22%	29%	53%	-	55%	14%
Decreased	46%	44%	-	-	-	57%	47%	32%	20%	57%	41%	14%
Base	85	256	3	-	1	47	119	34	15	7	22	7

Performance – Estimated occupancy levels May 2014

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

ERTM SERVICED ROOM OCCUPANCY

Feb-14	% RM OCCUPANCY	SAMPLE
English Riviera	62.36%	48
All hotels	67.17%	17
Hotel 10 rooms or less	21.41%	5
Hotel more than 10 rooms	68.62%	12
B&B	33.77%	12
Guest House	39.19%	19
Torquay	64.72%	30
Paignton	39.80%	11
Brixham	70.95%	3
Babbacombe	59.35%	3
**Cockington	0.00%	0
Other English Riviera	59.14%	1
Devon	61.49%	60
South West	62.73%	100

**Cockington data added to Torquay due to small sample

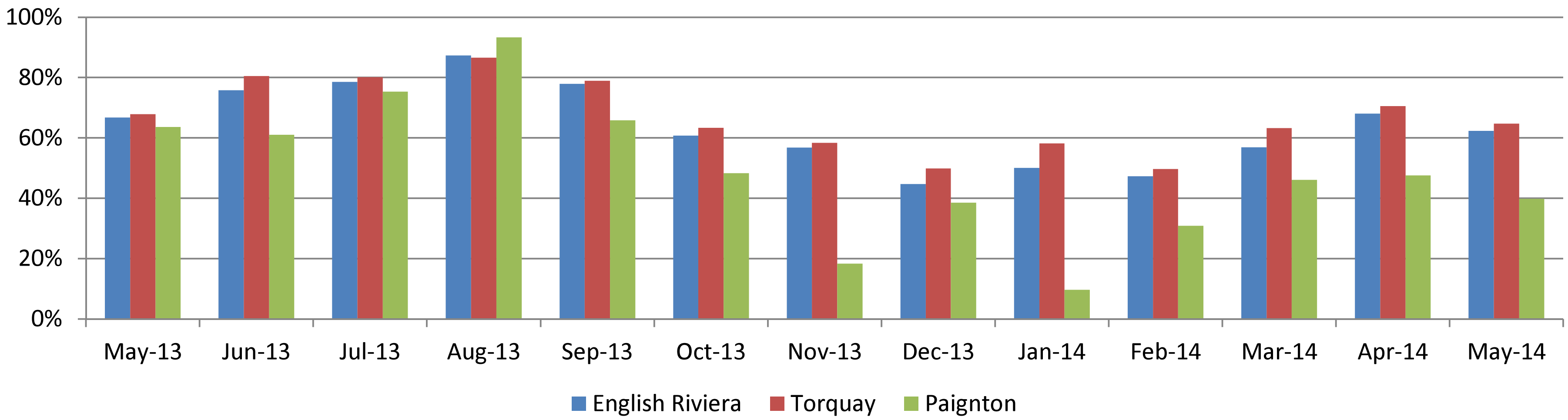
English Riviera serviced room occupancy was calculated at 62.36% for May 2014 compared with an average of 62.73% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for May 2014 was calculated at 51.36% compared with 39.19% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY

Feb-14	% UNIT OCC	SAMPLE
English Riviera	51.36%	12
Self-catering accommodation	51.36%	12
Holiday Park	0.00%	0
Torquay	40.78%	5
Paignton	59.19%	5
Brixham	0.00%	1
Babbacombe	0.00%	1
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	51.69%	22
South West	39.19%	63

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



SERVICED ROOM OCCUPANCY	May-13	June-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
English Riviera	66.73%	75.79%	78.61%	87.34%	77.96%	60.75%	56.83%	44.72%	50.07%	47.32%	56.90%	68.04%	62.36%
Torquay	67.83%	80.50%	80.10%	86.56%	78.96%	63.34%	58.40%	49.88%	58.22%	49.69%	63.22%	70.50%	64.72%
Paignton	63.60%	61.06%	75.31%	93.28%	65.84%	48.34%	18.32%	38.51%	9.63%	30.84%	46.09%	47.56%	39.8%
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 May 2014 English Riviera serviced occupancy was higher than Cornwall, Devon, Dorset and Wiltshire.

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

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14
South West	46.15%	47.12%	57.12%	63.21%	62.73%
BANES	*	*	*	*	*
Bristol	*	*	*	*	*
Cornwall	*	36.61%	48.59%	50.82%	57.60%
Devon	47.35%	44.94%	54.86%	66.40%	61.49%
English Riviera	**50.07%**	**47.32%**	**56.90%**	**68.04%**	62.36%
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%
Wiltshire	56.85%	59.82%	*	*	60.50%

*** Sample size less than 5**

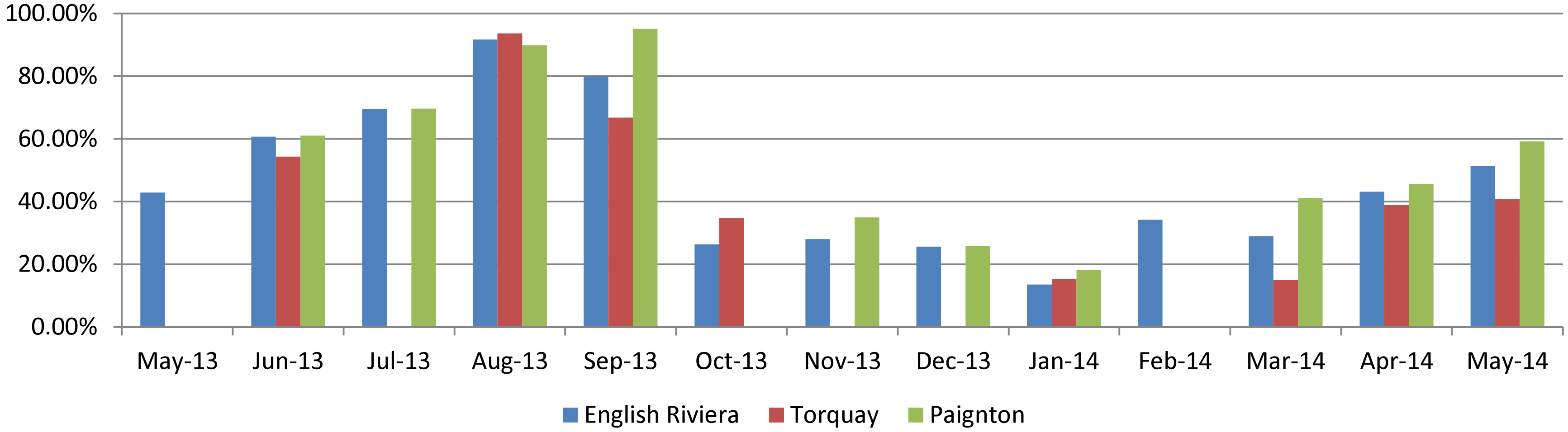
Performance – Estimated serviced accommodation occupancy levels 2014 by type

Key comparisons;
All ER Hotels – Higher than the regional average during January, February, April and May 2014.
ER Hotels (10 rooms or less) – Lower than the regional average during January, February and May 2014.
ER Hotels (more than 10 rooms) - Higher than the regional average during January, April and May 2014.
ER B&B/Guest House – Lower than the regional average during January, February, March, April and May 2014.

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

*** Sample size less than 5**

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



SELF-CATERING UNIT OCCUPANCY	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
All ER Self-catering	42.86%	60.65%	69.57%	91.68%	79.96%	26.37%	28.01%	25.64%	13.52%	34.23%	28.98%	43.17%	51.36%
Torquay	*	54.34%	*	93.62%	66.74%	34.79%	*	*	15.30%	*	15.00%	38.92%	40.78%
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 May 2014 English Riviera self-catering unit occupancy was higher than Cornwall, Somerset and the region as a whole.

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

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14
South West	16.89%	12.88%	30.19%	61.36%	39.19%
BANES	*	*	*	*	*
Bristol	*	*	*	*	*
Cornwall	15.25%	12.77%	36.89%	66.71%	28.26%
Devon	12.76%	35.44%	33.21%	58.18%	51.69%
English Riviera	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**
Dorset	19.71%	7.40%	13.98%	48.33%	63.30%
Gloucestershire	*	7.06%	*	88.79%	*
Somerset	19.23%	4.88%	17.89%	54.98%	31.82%
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 and May 2014.

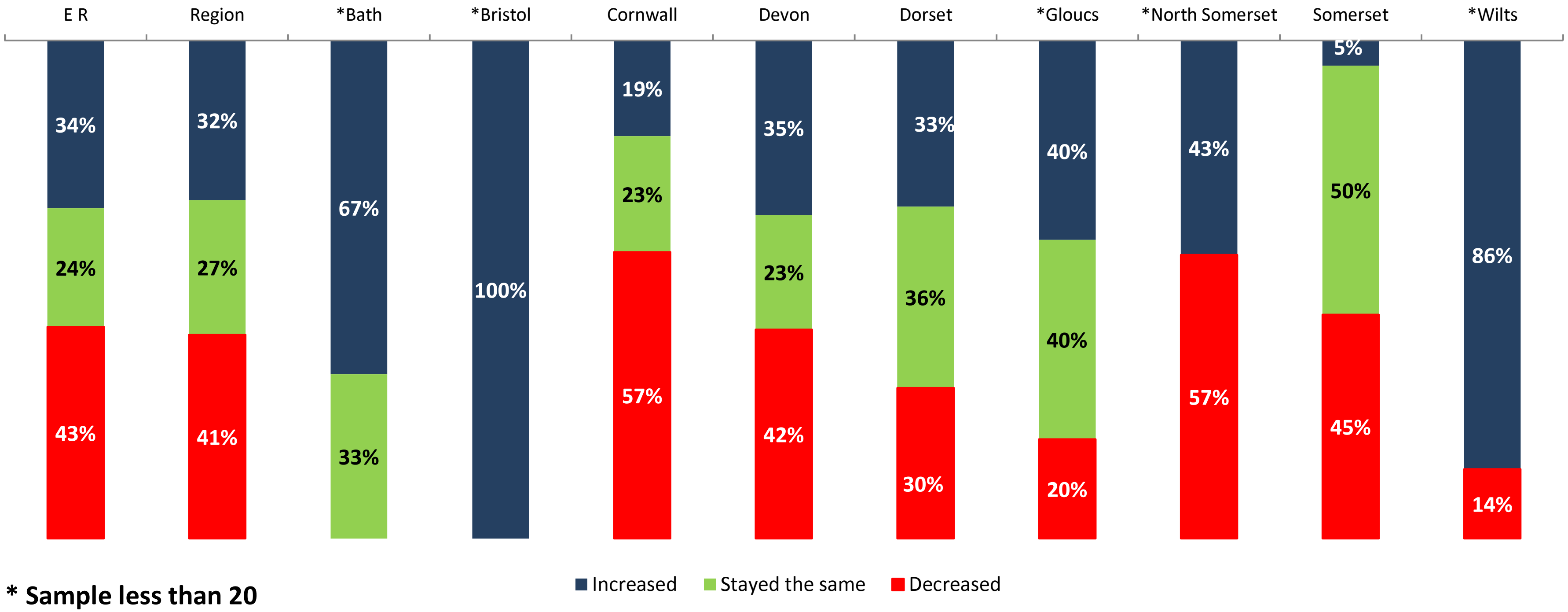
ER Self-catering (not including Holiday Parks) – Higher than the regional average in February, March and May 2014.

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

*** Sample size less than 5**

Performance – Turnover (2014-2013)

58% of English Riviera businesses reported increased (34%) or level turnover (24%) during May 2014 compared with May 2013, a similar proportion when compared with the region as a whole during the same period (59%). 43% of English Riviera businesses reported decreased turnover during May 2014 compared with 41% of businesses for the region as a whole.



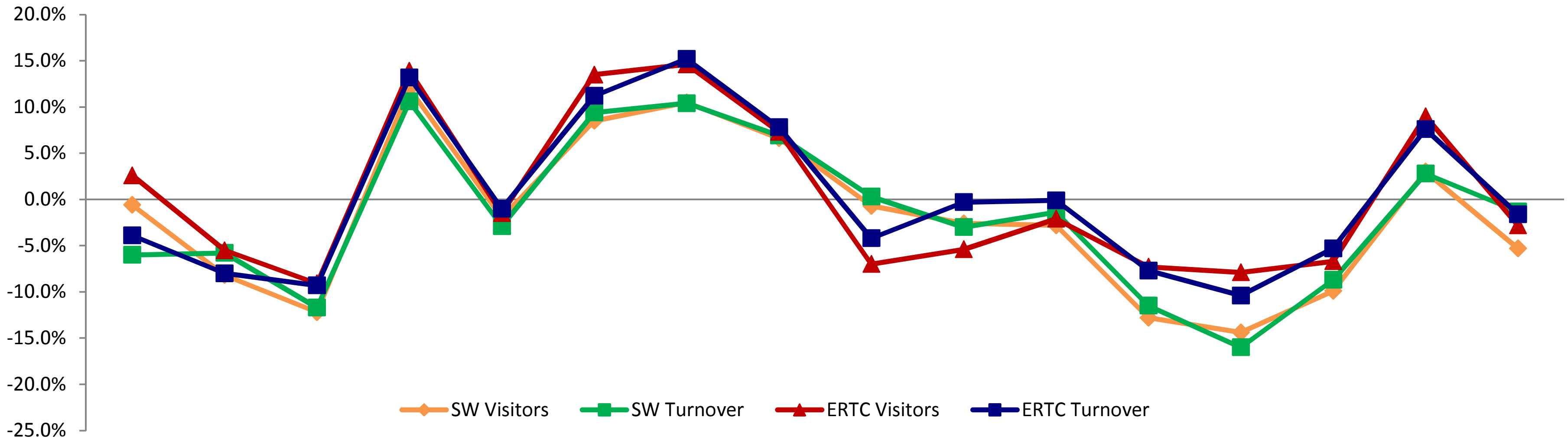
*** Sample less than 20**

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	34%	32%	67%	-	100%	19%	35%	33%	40%	43%	5%	86%
Stayed the same	24%	27%	33%	-	-	23%	23%	36%	40%	-	50%	-
Decreased	43%	41%	-	-	-	57%	42%	30%	20%	57%	45%	14%
Base	80	247	<5	-	<5	47	112	33	15	7	22	7

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 May 2014 English Riviera businesses reported decreases of -2.8% in terms of visitors and -1.6% in terms of turnover compared with May 2013 which compares favourably against the regional average decreases of -5.3% and -1.3% in terms of visitors and turnover during the same period.

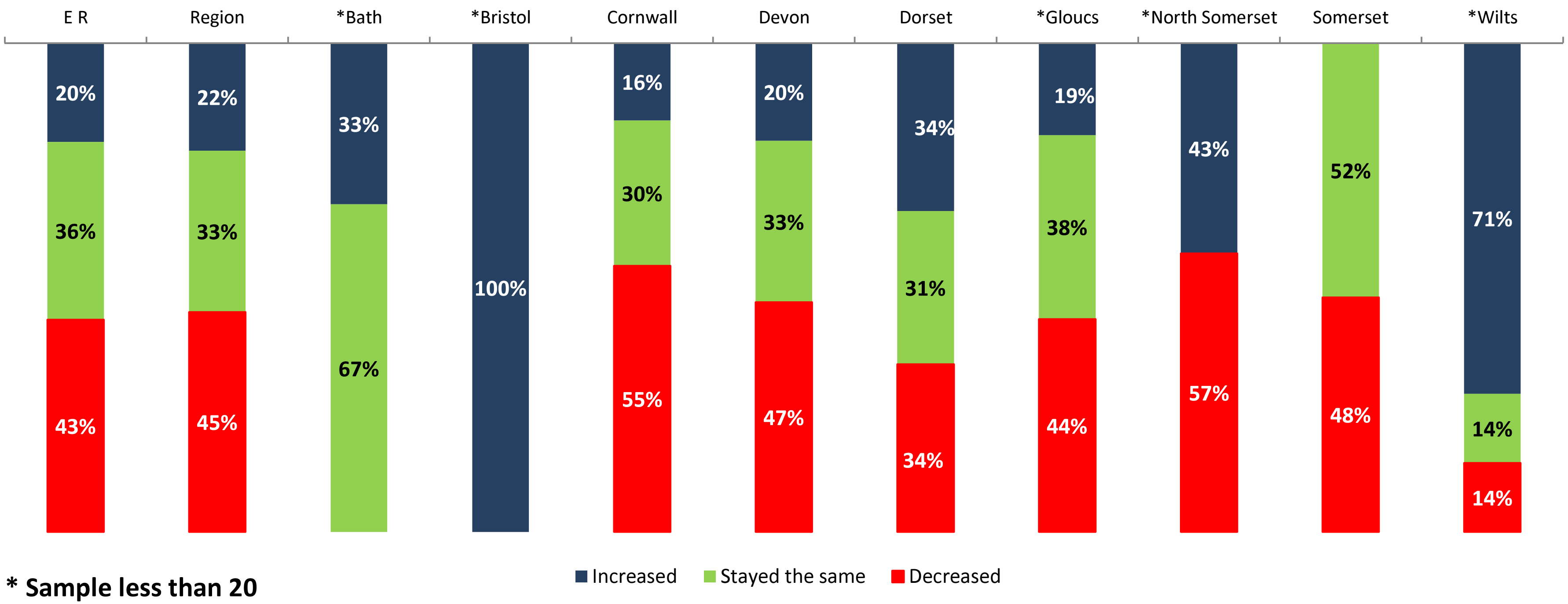
ERTC	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
Visitors	2.6%	-5.5%	-9.1%	13.9%	-1.5%	13.5%	14.6%	7.3%	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%	9.0%	-2.8%
Turnover	-3.9%	-8.0%	-9.3%	13.2%	-1.0%	11.2%	15.2%	7.8%	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%	7.6%	-1.6%



Region	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
Visitors	-0.6%	-8.2%	-12.2%	12.0%	-2.0%	8.5%	10.5%	6.6%	-0.7%	-2.6%	-2.8%	-12.8%	-14.4%	-9.9%	3.0%	-5.3%
Turnover	-6.0%	-5.8%	-11.7%	10.6%	-2.9%	9.4%	10.4%	6.9%	0.3%	-3.0%	-1.4%	-11.5%	-16.0%	-8.7%	2.8%	-1.3%

Performance – Profitability (2014-2013)

56% of all English Riviera businesses reported increased (20%) or level profitability (36%) for the month, a similar proportion to the SW region as a whole during the same period (55%). 43% of businesses reported theirs as being lower than during May 2013 (45% of SW businesses).



*** Sample less than 20**

Profitability	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	20%	22%	33%	-	100%	16%	20%	34%	19%	43%	-	71%
Stayed the same	36%	33%	67%	-	-	30%	33%	31%	38%	-	52%	14%
Decreased	43%	45%	-	-	-	55%	47%	34%	44%	57%	48%	14%
Base	74	232	<5	-	<5	44	104	29	16	7	21	7

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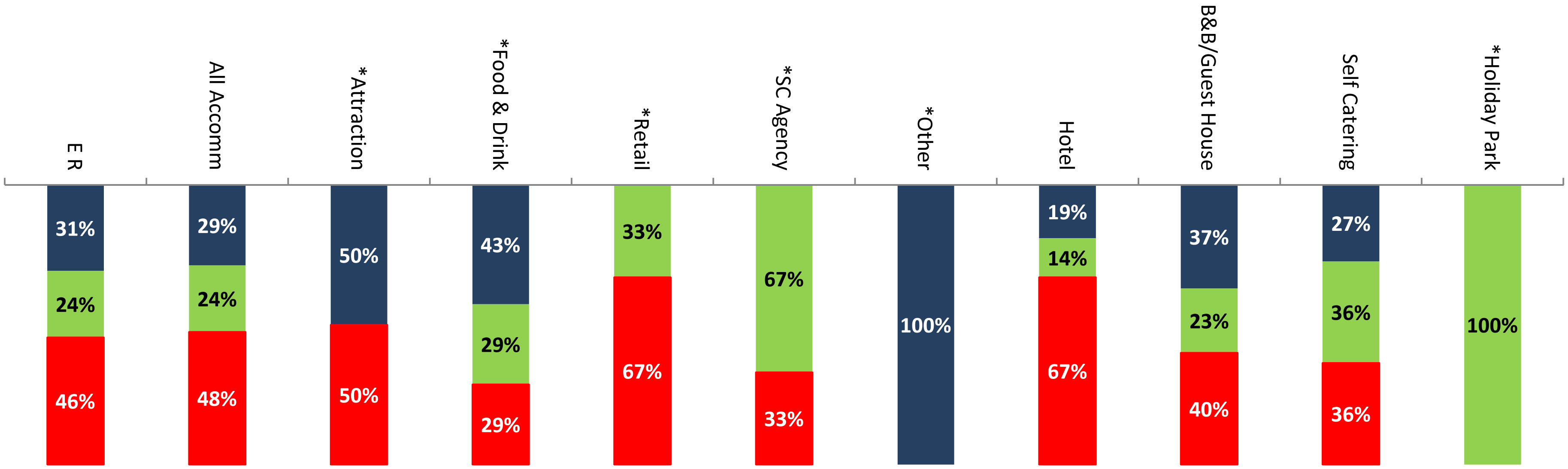
Business Type Performance

Business Type Performance – Visitor numbers (2014-2013)

53% of all accommodation providers reported increased (29%) or level (24%) visitor numbers for May 2014. 63% of Self Catering operators and 60% of B&B/Guest Houses reported increased or level visitor numbers for May 2014 compared with the same time last year. 67% of Hotels reported decreased visitor numbers compared with the same time last year.

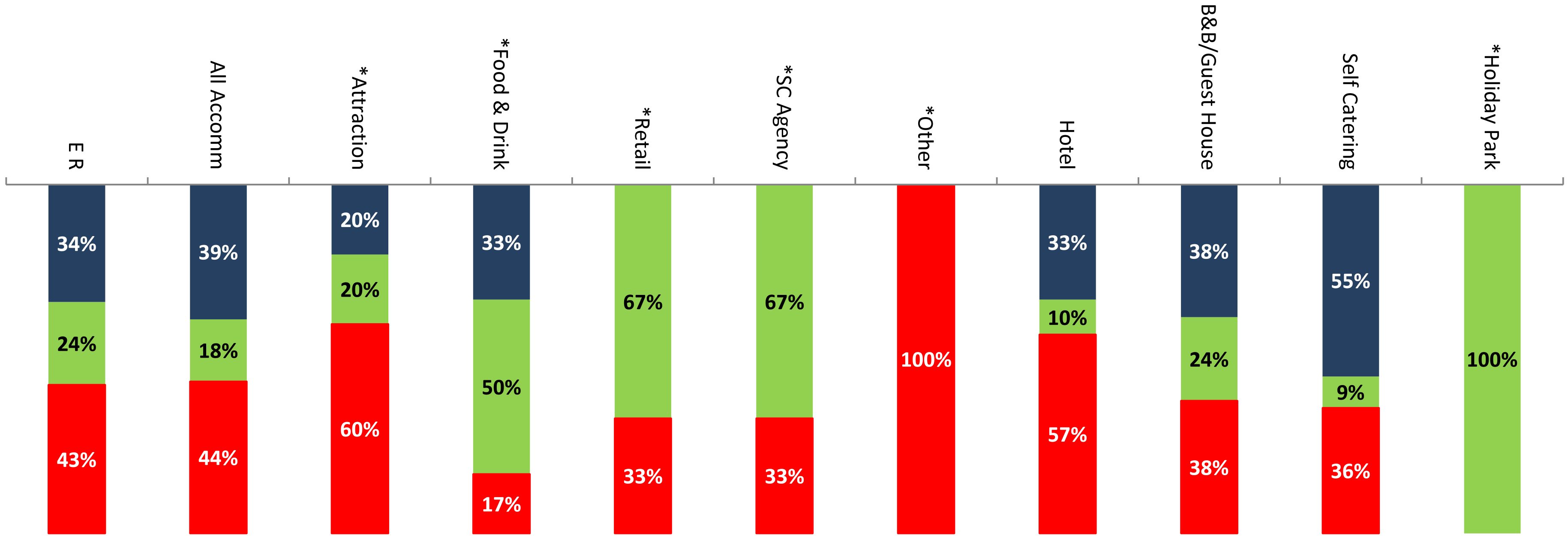


*** Sample less than 10**

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	31%	29%	50%	-	43%	-	-	-	100%	19%	37%	27%	-	-
Stayed the same	24%	24%	-	-	29%	33%	-	67%	-	14%	23%	36%	100%	-
Decreased	46%	48%	50%	-	29%	67%	-	33%	-	67%	40%	36%	-	-
Base	85	63	8	-	7	<5	-	<5	<5	21	30	11	<5	-

Business Type Performance – Turnover (2014-2013)

57% of all accommodation providers reported increased (39%) or level turnover (18%) for May 2014. 64% of Self Catering operators and 62% of B&B/Guest Houses reported increased or level turnover for May 2014 compared with the same time last year. 57% of Hotels reported decreased turnover compared with the same time last year.

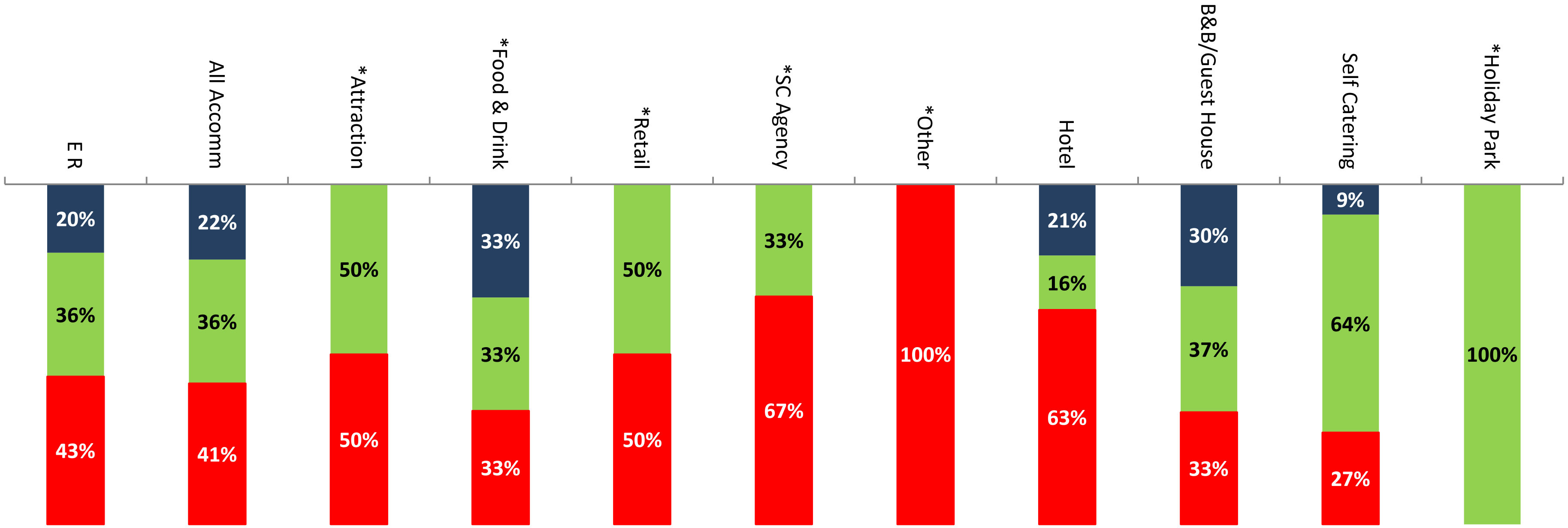


*** Sample less than 10**

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	34%	39%	20%	-	33%	-	-	-	-	33%	38%	55%	-	-
Stayed the same	24%	18%	20%	-	50%	67%	-	67%	-	10%	24%	9%	100%	-
Decreased	43%	44%	60%	-	17%	33%	-	33%	100%	57%	38%	36%	-	-
Base	80	62	5	-	6	<5	-	<5	<5	21	29	11	<5	-

Business Type Performance – Profitability (2014-2013)

58% of all accommodation providers reported increased (22%) or level (36%) profitability for May 2014. 73% of Self Catering operators and 67% of B&B/Guest Houses reported increased or level profitability for May 2014 compared with the same time last year. In contrast, 63% of Hotels reported decreased profitability compared with the May 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	20%	22%	-	-	33%	-	-	-	-	21%	30%	9%	-	-
Stayed the same	36%	36%	50%	-	33%	50%	-	33%	-	16%	37%	64%	100%	-
Decreased	43%	41%	50%	-	33%	50%	-	67%	100%	63%	33%	27%	-	-
Base	74	58	<5	-	6	<5	-	<5	<5	19	27	11	<5	-

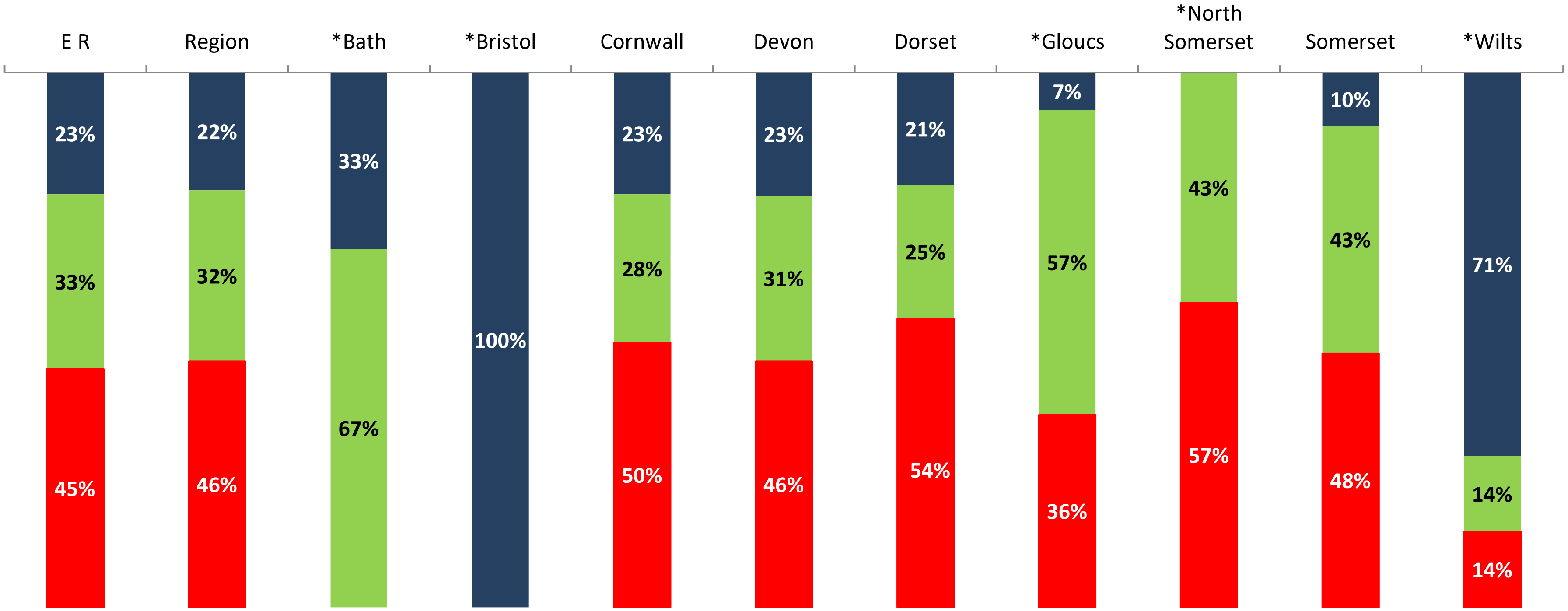
English Riviera Tourism Monitor

May 2014

Looking Ahead

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

56% of English Riviera businesses reported that their booking levels for June 2014 were looking better than or the same as June 2013, compared with 54% of businesses in each case within the region as a whole and Devon.

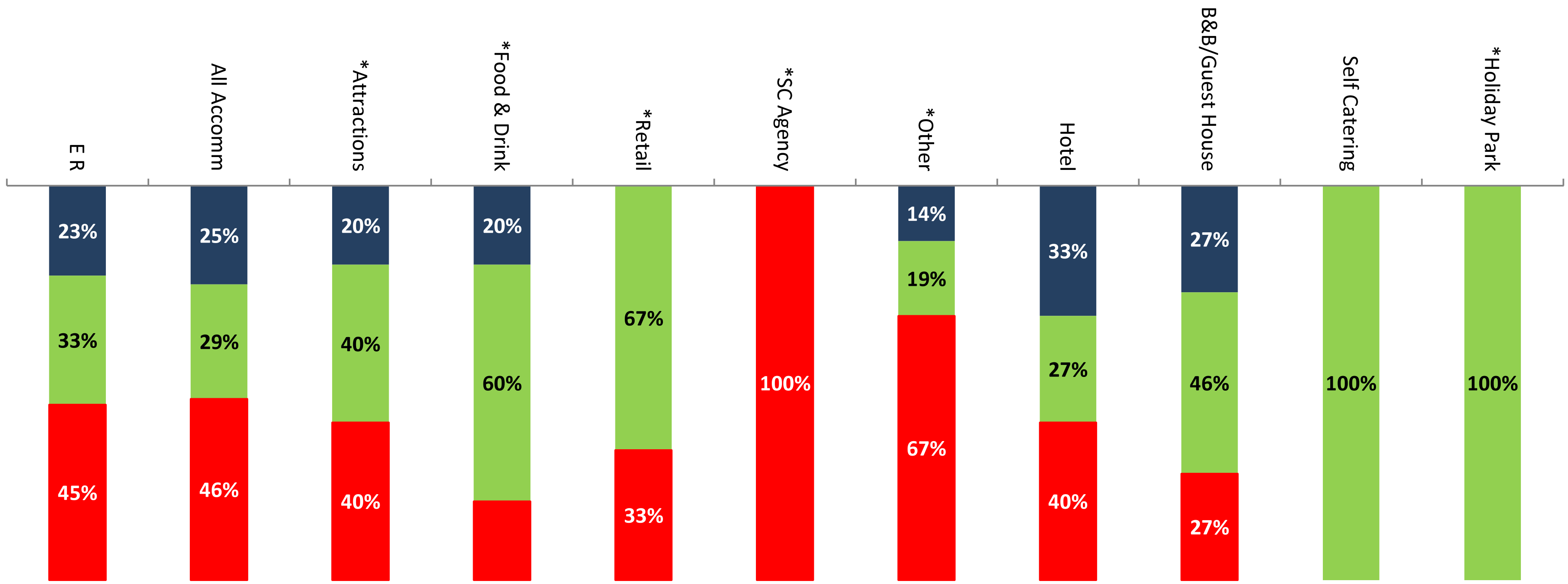


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	23%	22%	33%	-	100%	23%	23%	21%	7%	-	10%	71%
The same	33%	32%	67%	-	-	28%	31%	25%	57%	43%	43%	14%
Not as good	45%	46%	-	-	-	50%	46%	54%	36%	57%	48%	14%
Base	80	229	<5	-	<5	40	107	28	14	7	21	7

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

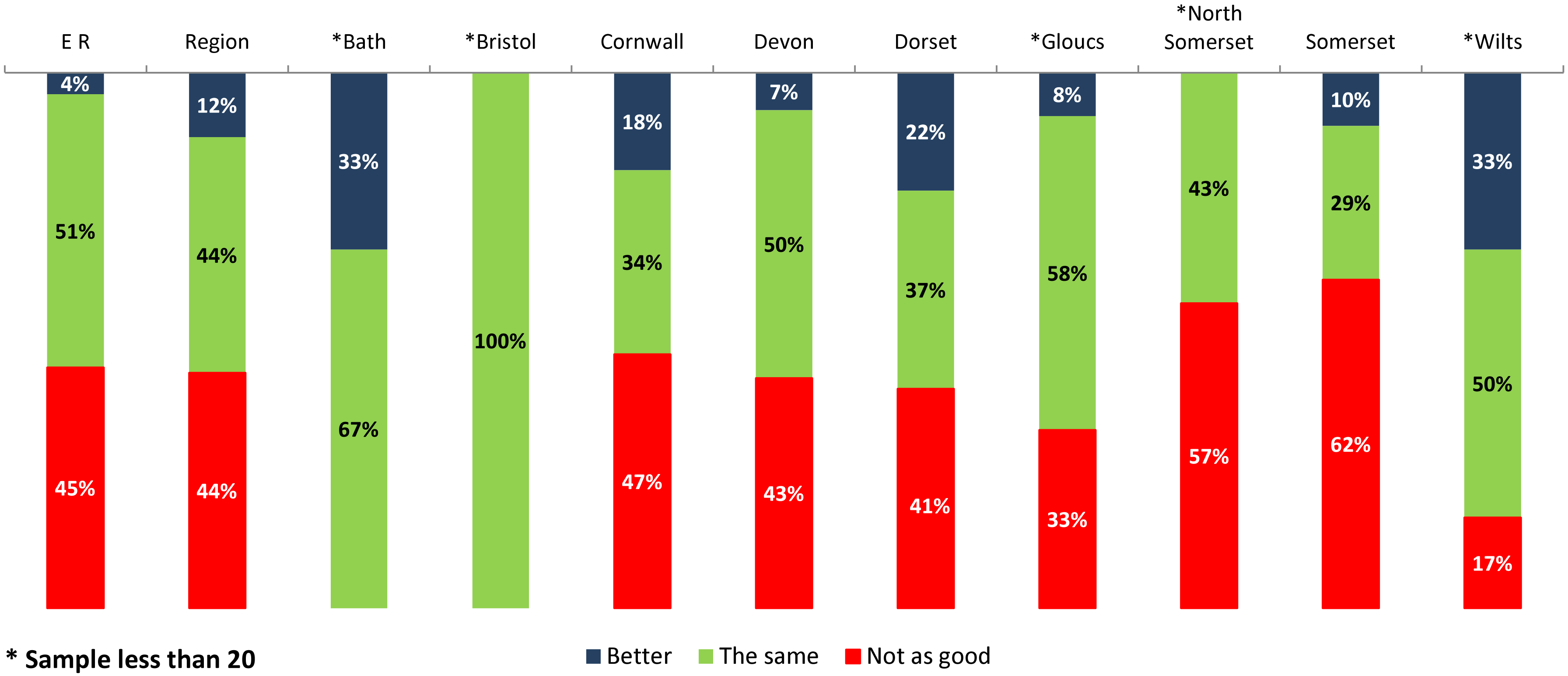
54% of all accommodation providers reported that their June 2014 booking levels were looking better than or the same as last year. 100% of Self Catering operators, 73% of B&B/Guest Houses and 60% of Hotels reported that their booking levels for June 2014 were looking better than or the same as June 2013.



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	23%	25%	20%	-	20%	-	-	-	14%	33%	27%	-	-
Same	33%	29%	40%	-	60%	67%	-	-	19%	27%	46%	100%	100%
Not as good	45%	46%	40%	-	20%	33%	-	100%	67%	40%	27%	-	-
Base	80	63	5	-	5	<5	-	<5	21	30	11	<5	<5

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

55% of all businesses reported that their school summer holidays booking levels were looking better (4%) or the same as (51%) in 2013 compared with 56% of businesses in the region as a whole and 57% within Devon.

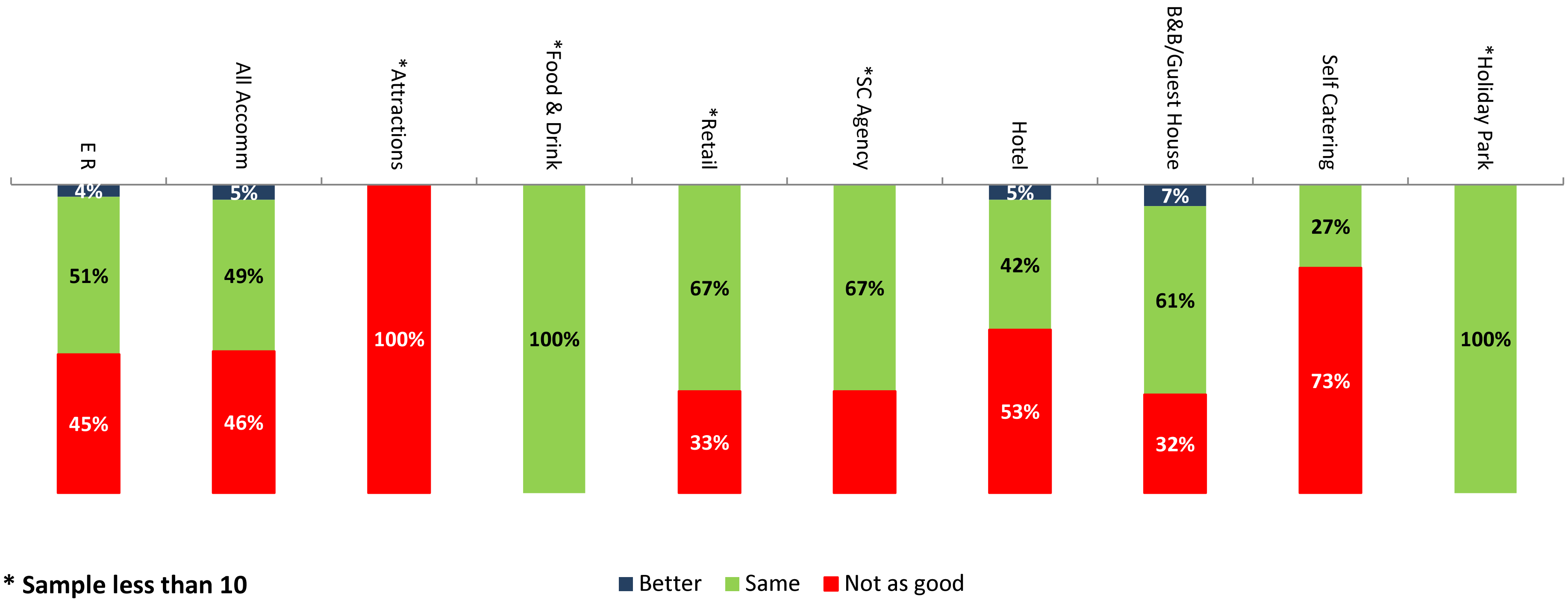


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	4%	12%	33%	-	-	18%	7%	22%	8%	-	10%	33%
The same	51%	44%	67%	-	100%	34%	50%	37%	58%	43%	29%	50%
Not as good	45%	44%	-	-	-	47%	43%	41%	33%	57%	62%	17%
Base	67	207	<5	-	<5	38	92	27	12	7	21	6

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

54% of all accommodation providers reported that their school summer holidays 2014 booking levels were looking better than (5%) or the same as 2013 (49%) whilst 46% said that they were looking worse than 2013. 68% of B&B/Guest Houses reported that their school summer holidays 2014 booking levels were looking better than or the same as 2013. 73% of Self Catering operators said that they were looking worse than 2013 along with 53% of Hotels.



*** 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	4%	5%	-	-	-	-	-	-	5%	7%	-	-	-
Same	51%	49%	-	-	100%	67%	67%	-	42%	61%	27%	100%	-
Not as good	45%	46%	100%	-	-	33%	33%	-	53%	32%	73%	-	-
Base	67	59	<5	-	<5	<5	<5	-	19	28	11	<5	-

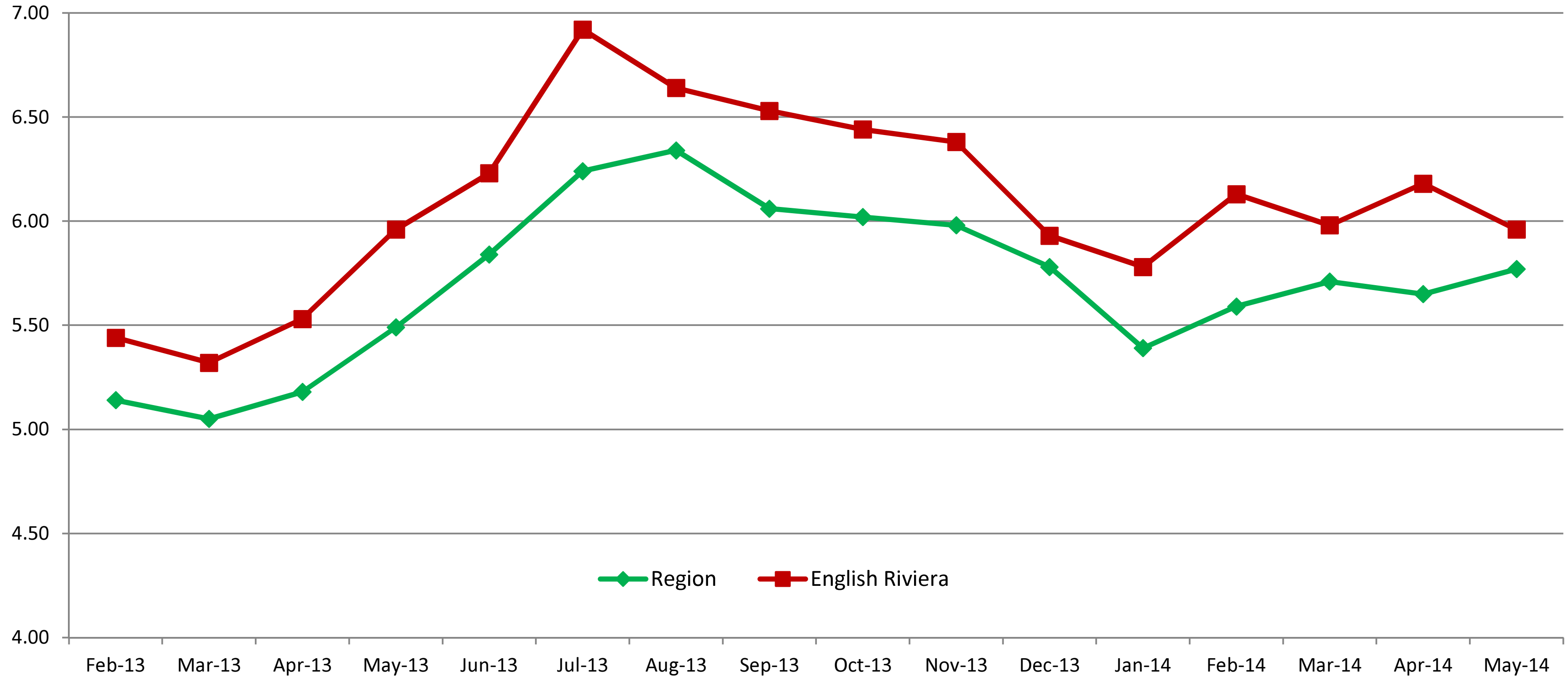
English Riviera Tourism Monitor

May 2014

Business Optimism

Business Optimism

Businesses on the English Riviera recorded an optimism score of 5.96 for May 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. This was a small decrease compared with the optimism score recorded last month (6.18) but remains higher than the South West regional score for May 2014 of 5.77.



Optimism	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
English Riviera	5.44	5.32	5.53	5.96	6.23	6.92	6.64	6.53	6.44	6.38	5.93	5.78	6.13	5.98	6.18	5.96
Region	5.14	5.05	5.18	5.49	5.84	6.24	6.34	6.06	6.02	5.98	5.78	5.39	5.59	5.71	5.65	5.77

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 with the weather, World Cup and bad press about the flooding/rail closure featuring most heavily this month.

The services currently supplied by Torbay Council are well below par. Grass cutting, weeding, litter collection should all be at their peak now we are in high season. The weeding of our High St (Fore St) is scheduled to take place in September. What right minded tourist destination would leave the weeding of the main high street until September? It an absolute disgrace for all the business rate and council tax paying establishments and can only have a negative impact on the perception of Brixham both by its community and visitors. Brixham looks neglected and unkempt, the council need to sort it out.

The hotels should be full by now but as the sun isn't shining there is still loads of spare bed capacity. As we only make money over the summer and May and June haven't been great, then I worry about our full year outcome - too many beds in Torquay except at peak times.

The weather has been a positive factor in last minute bookings. People aren't coming here for the 'festivals' but they really enjoy them when they are on.

Get Torbay on the national weather map!!

We think the world cup may be having a negative impact on June/July as we are very quiet during this period.

We are still in recession and business is still very slow with little improvement in our area as people are still not spending much money in the shops and rent and rates are still very high.

June bookings are well down on last year - is it the World Cup, the Dawlish legacy or something else? Feedback from guests ... shame Torre Abbey isn't open during the week and the Pavilion closed. The public toilets next to The Princess Theatre in Torquay are filthy. Loved the Torquay food fest, Torre Abbey, great priced boat trips, steam trains (but a bit expensive), Living Coasts, Paignton Zoo and D-Day.

Bad press about the weather February, March etc., high parking charges, lack of attractions in poor weather, empty shops, lack of street cleaning.

We are retaining good repeat bookings and bookings by recommendation but finding new customers more difficult to come by. Most booking systems do not cater for self-catering tariffs

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

The South West Research Company