English Riviera Tourism Monitor

November 2014

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

January 2015

Executive Summary

Compared to November 2013 businesses reported that:

November 2014 Visitor levels:

Increased 29% / Stayed the same 36% / Decreased 36%

Estimated actual change in visitors -1.4%

November 2014 Turnover levels:

Increased 19% / Stayed the same 40% / Decreased 40%

Estimated actual change in turnover -3.1%

November 2014 Profitability was:

Higher 20% / Stayed the same 41% / Decreased 39%

December 2014 Outlook is:

Better 39% / Same as last year 25% / Not as good 36%

January 2015 Outlook is:

Better 17% / Same as last year 33% / Not as good 50%

Optimism

Optimism score is 6.54 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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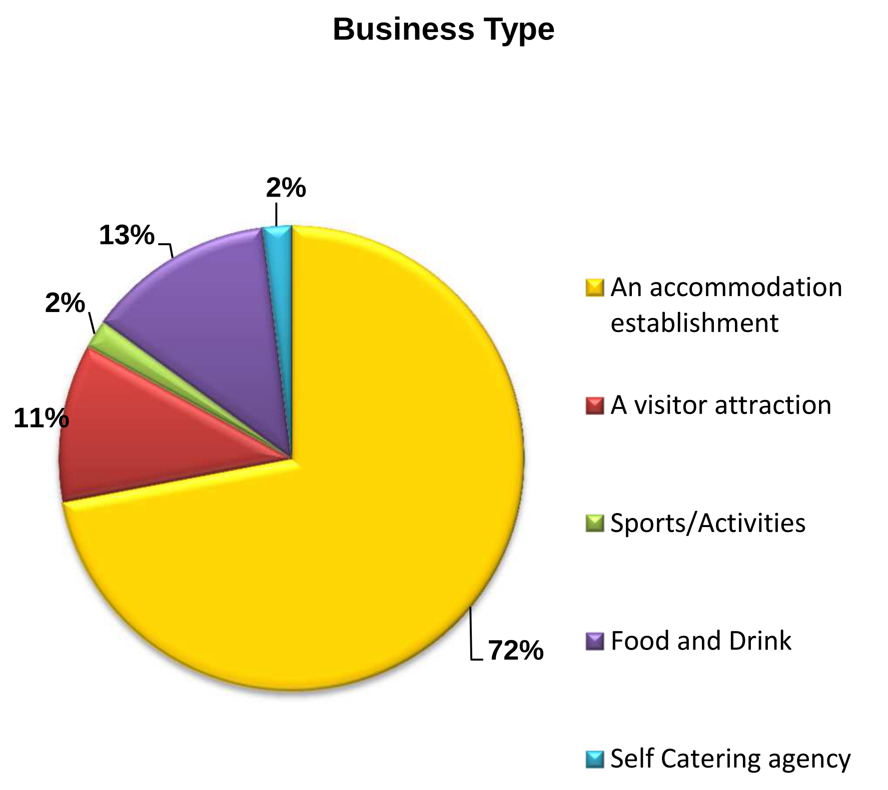
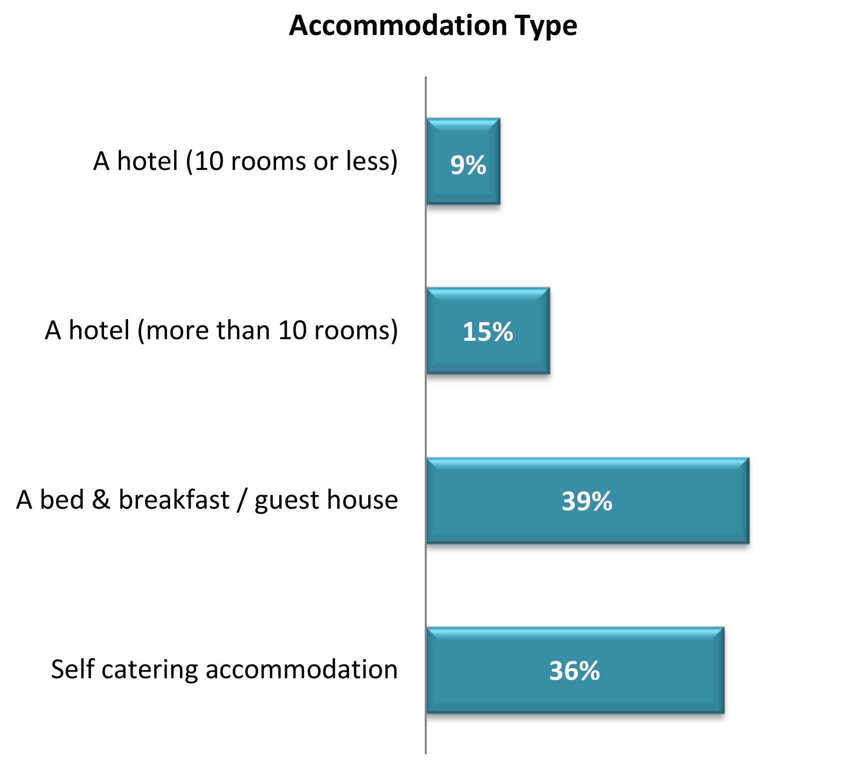
Sample Profile

Business Type



Base = 46

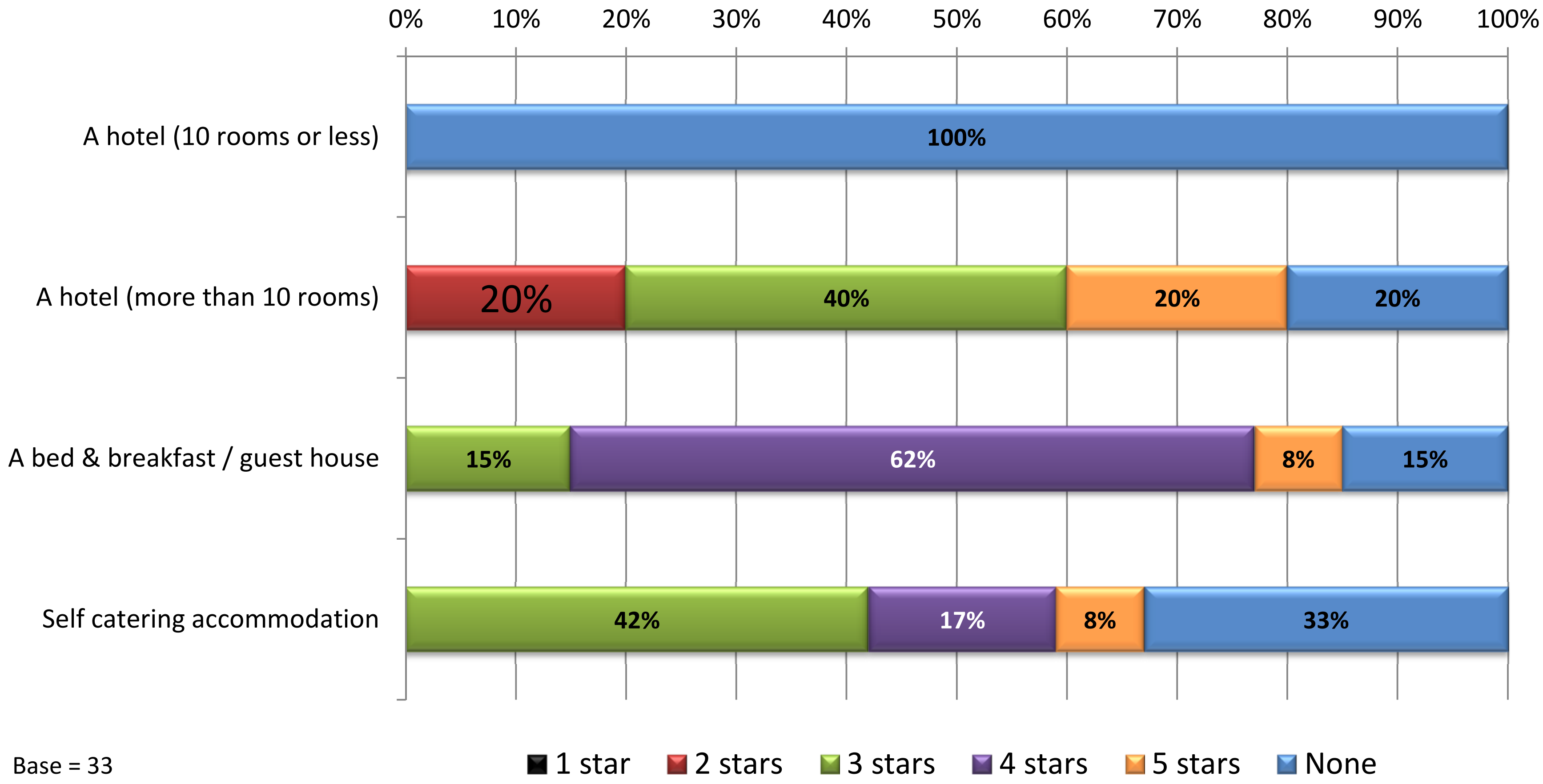


Base = 33

Accommodation providers accounted for 72% of responses with Food & Drink establishments and Visitor Attractions accounting for 13% and 11% respectively.

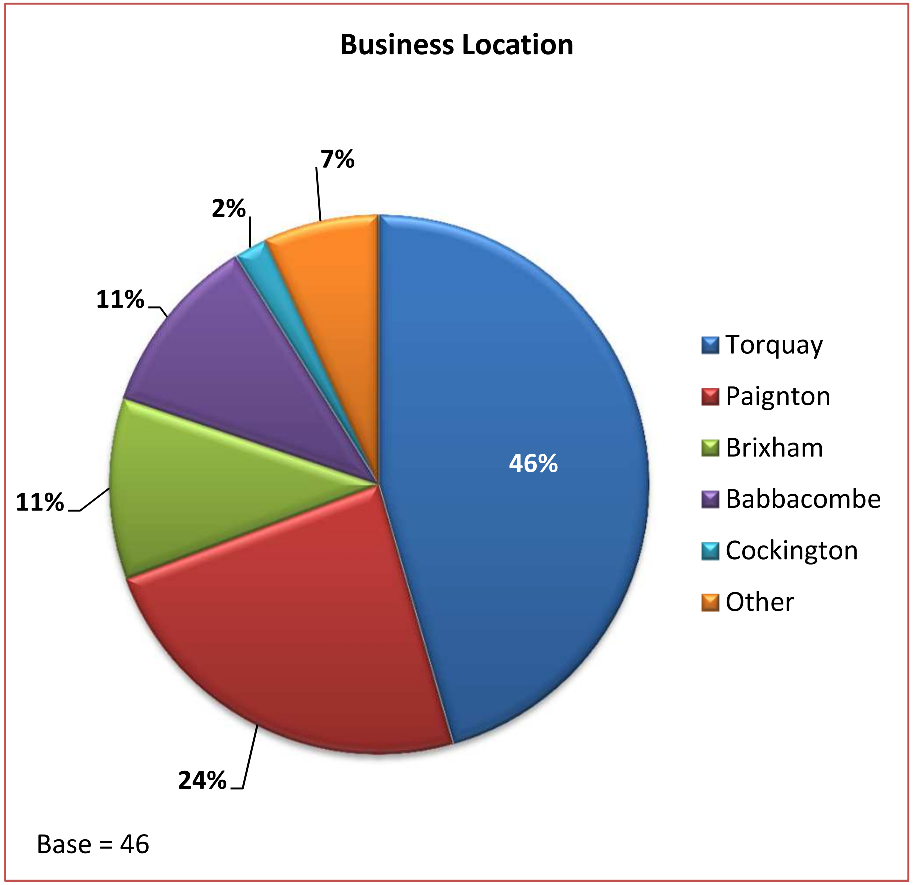
Serviced accommodation providers accounted for 63% of accommodation responses and Self catering accommodation a further 36%.

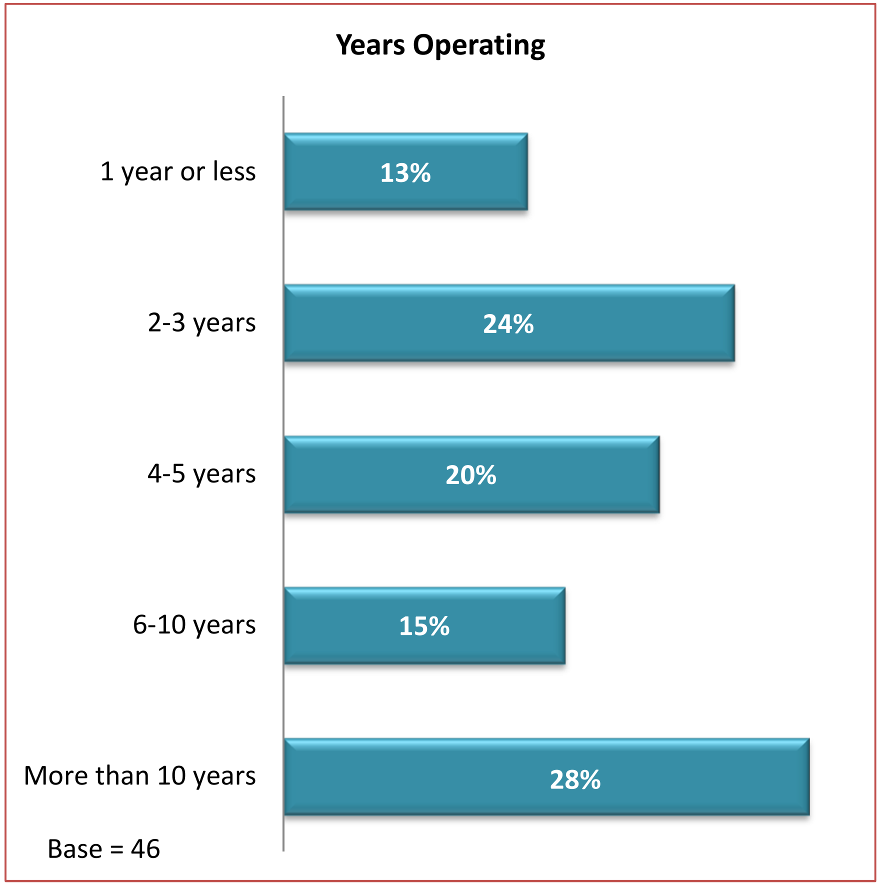
Accommodation Type and Rating



100% of hotels with 10 rooms or less, 33% of Self catering operators and 20% 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 46% of responses with 24% from Paignton. A further 11% of businesses in each case were from Brixham and Babbacombe whilst 2% were from Cockington. A further 7% of businesses were based elsewhere in the resort.

43% of businesses have been operating for more than 6 years.

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November 2014

The Month in Context

November 2014 – The Month in Context

The UK weather

The generally unsettled and mild theme of October continued through most of November with only short periods of drier weather. Low pressure was often over or to the west of the UK for the first half of the month bringing rain and strong winds at times. However, with these winds frequently from a southerly direction, the month again saw well above average temperatures.

The provisional UK mean temperature was 7.6 °C, which is 1.4 °C above the 1981-2010 long-term average. This made it the fifth warmest November for the UK in a series from 1910, although November 2011 was warmer. Rainfall was well above average in many areas, with approaching double the long-term average in parts of Northern Ireland, eastern Scotland and southern England, but western and central Scotland, north-west England and North Wales were drier, so the overall UK rainfall total was 101% of average. Sunshine was rather below normal in eastern areas, but it was brighter further west, with a UK figure of 93%. A wind gust of 93 mph was recorded at Berry Head (Devon) during the 13th.

Weather impacts

Heavy rain from an active weather system affected the northern half of the UK during the 6th and 7th, bringing strong winds and high rainfall totals to Northern Ireland and much of Scotland. During the following week, further spells of rain led to increased concerns about flooding for south-west England and south Wales and from 13th to 14th a large area of low pressure to the west of the UK brought heavy rain and some very strong winds to south-west England, south Wales, Northern Ireland and parts of Scotland. However, any flooding was generally localised. The second half of the month was less unsettled, but lighter winds and moisture from the previous falls of rain readily allowed fog to form. The weather remained unseasonably mild with few air frosts, and there were some sightings of frog spawn reported in Cornwall.

Source: Met Office

November 2014 – The Month in Context

The UK Economy

Britain's economic recovery remains on track, with 0.7% growth in the third quarter according to the Office for National Statistics' second estimate. However, the detailed breakdown of the data appeared less rosy. Growth was dependent on household spending and the services sector at a time when the national ambition is to rebalance towards more exports and business investment – both of which fell between July and September. The broad picture of the UK economy is one of continued recovery. Gross domestic product increased by 0.7% in the third quarter, the seventh consecutive quarter of growth, albeit a slight slowdown compared with the 0.9% growth achieved in the second quarter. Britain is on track to be the fastest growing G7 economy in 2014, with growth of about 3%.

All the major sectors of the economy have recovered since the depths of the crisis when construction and manufacturing were hit particularly hard. However, the services sector – which accounts for about three-quarters of the UK economy and includes bars and restaurants, hotels and hairdressing – has outperformed other sectors and is leading the recovery. It is the only sector where output has exceeded pre-crisis levels. The government's much-desired rebalancing of the economy remained elusive in the third quarter. The chancellor's vision of an export-led recovery has failed to materialise. The spending side of the economy was dominated by households between July and September. Exports fell, while imports rose, meaning that net trade was a drag on GDP over the period.

Growth of 0.7% in the third quarter is impressive relative to some of the world's other advanced economies. Japan is back in recession; Germany narrowly avoided one scraping growth of just 0.1%; the Eurozone economy as a whole grew by 0.2%. Recovery in the US got underway earlier than Britain and the world's largest economy grew by about 0.9% quarter on quarter between July and September, but the UK is expected to grow faster in 2014 overall. The International Monetary Fund is predicting UK growth of 3.2% in 2014, above its 2.2% forecast for the US and better than any other G7 country. A rebalancing of the economy is dependent on a turnaround in Britain's export fortunes. The UK is falling woefully short on this, with the trade deficit widening to £11.2bn in the third quarter from £8.9bn in the second after exports fell but imports rose. The chancellor's target of doubling UK exports to £1tn by 2020 is looking increasingly out of reach.

Source: The Guardian

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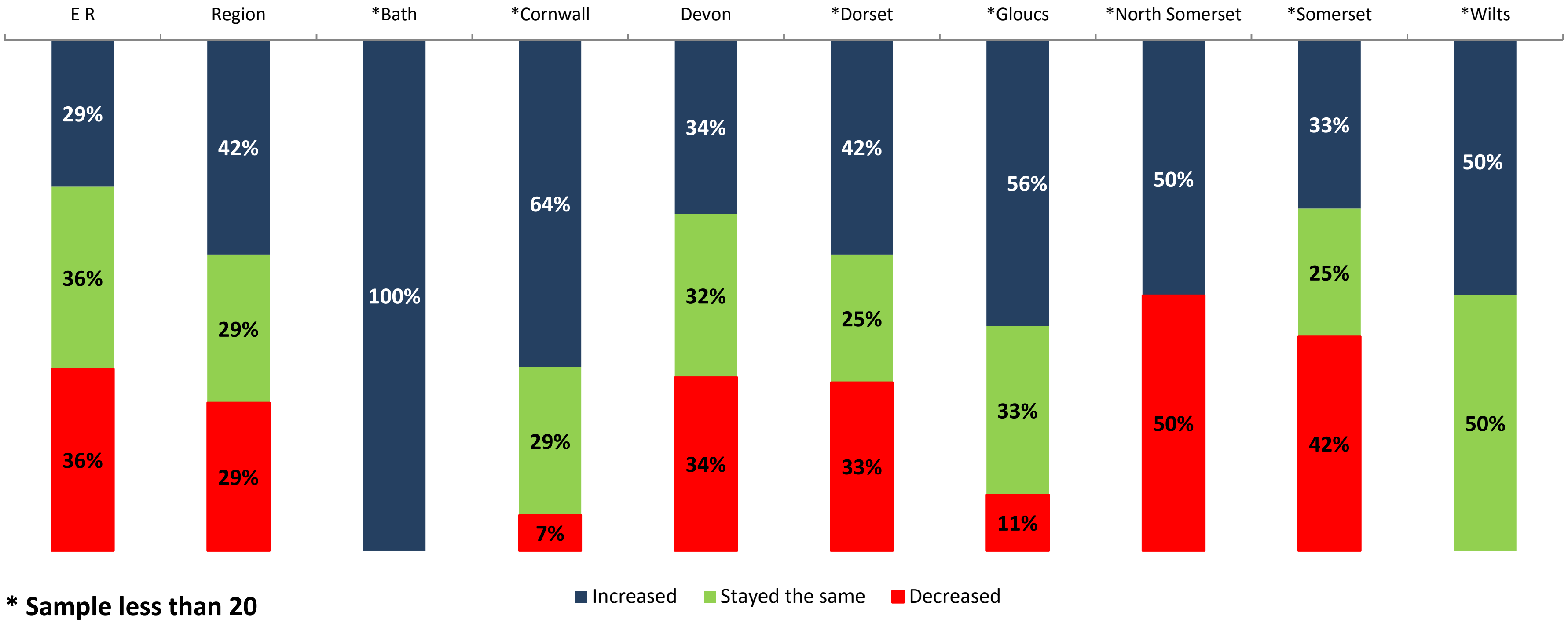
Performance

Performance – Visitor Numbers (2014-2013)

65% of English Riviera businesses reported that their visitor numbers had increased (29%) or stayed the same (36%) compared with November 2013 – a slightly lower proportion when compared against the region as a whole during the same period (71%). 36% of businesses indicated that their visitor numbers had decreased compared with the same time last year (29% regionally).



*** Sample less than 20**

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	29%	42%	100%	-	-	64%	34%	42%	56%	50%	33%	50%
Stayed the same	36%	29%	-	-	-	29%	32%	25%	33%	-	25%	50%
Decreased	36%	29%	-	-	-	7%	34%	33%	11%	50%	42%	-
Base	42	121	<5	-	-	14	65	12	9	<5	12	<5

Performance – Estimated occupancy levels November 2014

The slides to follow show the estimated occupancy for November 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

November-14	% RM OCCUPANCY	SAMPLE
English Riviera	47.17%	15
All hotels	47.51%	6
Hotel 10 rooms or less	2.63%	<5
Hotel more than 10 rooms	63.79%	<5
B&B	39.71%	<5
Guest House	33.72%	6
Torquay	63.19%	9
Paignton	24.15%	<5
Brixham	66.97%	<5
Babbacombe	1.30%	<5
**Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	60.25%	23
South West	60.33%	37

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

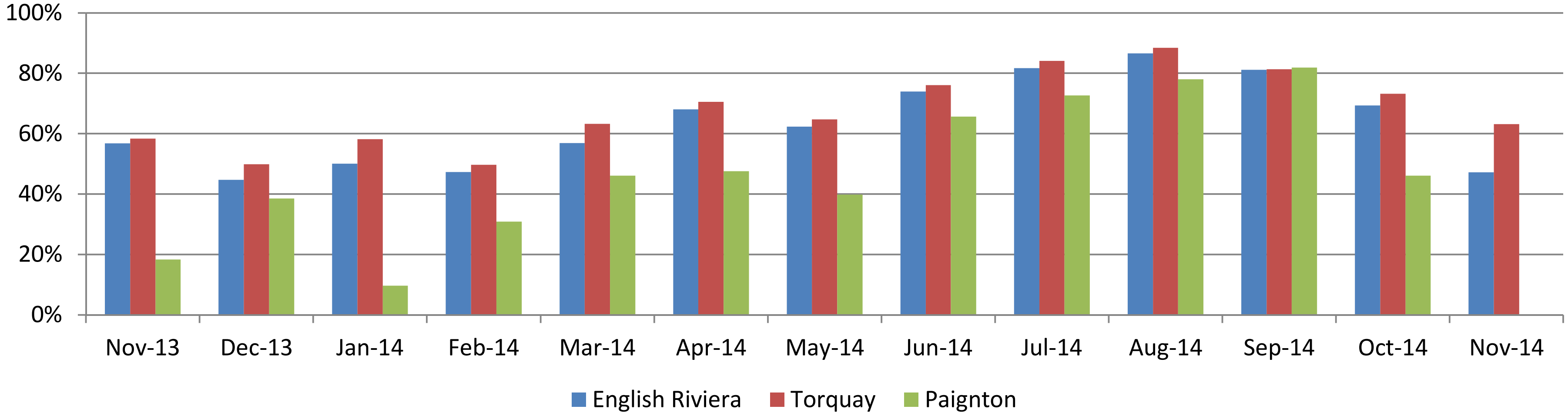
English Riviera serviced room occupancy was calculated at 47.17% for November 2014 compared with an average of 60.33% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for November 2014 was calculated at 31.03% compared with 31.17% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY

November-14	% UNIT OCC	SAMPLE
English Riviera	31.03%	12
Self-catering accommodation	31.03%	12
Holiday Park	0.00%	0
Torquay	11.44%	<5
Paignton	45.32%	5
Brixham	0.00%	<5
Babbacombe	0.00%	<5
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	30.63%	15
South West	31.17%	35

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



SERVICED ROOM OCCUPANCY	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14
English Riviera	56.83%	44.72%	50.07%	47.32%	56.90%	68.04%	62.36%	73.97%	81.71%	86.59%	81.14%	69.30%	47.17%
Torquay	58.40%	49.88%	58.22%	49.69%	63.22%	70.50%	64.72%	76.09%	84.07%	88.44%	81.33%	73.21%	63.19%
Paignton	18.32%	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 November 2014 English Riviera serviced occupancy was lower than all comparison areas.

Key comparisons;
South West – ER performance was higher than the regional average during all months except March, May, June & November 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
South West	46.15%	47.12%	57.12%	63.21%	62.73%	75.60%	81.27%	82.17%	75.79%	67.65%	60.33%
Former Avon	*	*	*	*	*	*	*	*	*	*	*
Cornwall	*	36.61%	48.59%	50.82%	57.60%	67.16%	86.28%	89.10%	36.31%	72.19%	*
Devon	47.35%	44.94%	54.86%	66.40%	61.49%	73.97%	80.49%	83.29%	80.25%	67.70%	60.25%
English Riviera	**50.07%**	**47.32%**	**56.90%**	**68.04%**	**62.36%**	**73.97%**	**81.71%**	**86.59%**	**81.14%**	**69.30%**	**47.17%**
Dorset	54.58%	27.23%	*	44.59%	52.09%	*	73.06%	*	71.12%	*	*
Gloucestershire	*	*	77.59%	41.92%	61.65%	*	71.38%	*	*	*	*
Somerset	32.48%	46.42%	37.22%	65.40%	70.42%	55.84%	67.91%	71.51%	72.08%	*	*
Wiltshire	56.85%	59.82%	*	*	60.50%	*	*	68.14%	*	*	*

*** Sample size less than 5**

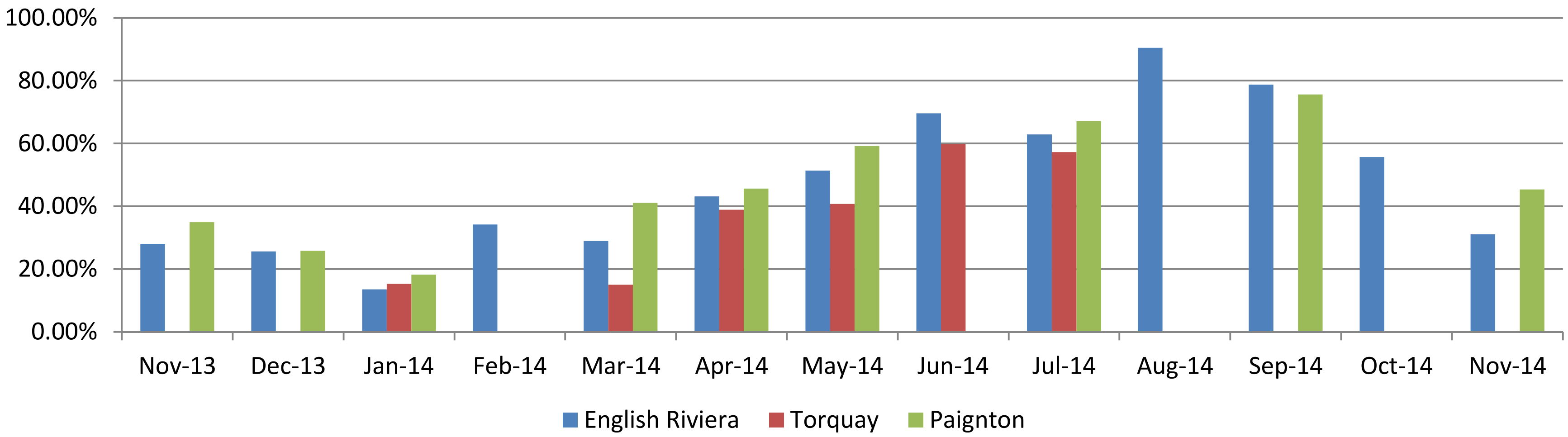
Performance – Estimated serviced accommodation occupancy levels 2014 by type

Key comparisons;
All ER Hotels – Higher than the regional average during all months except March and June 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
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%**
All SW hotels	50.76%	51.93%	62.15%	67.71%	67.08%	77.84%	84.07%	83.08%	77.68%	71.71%	*
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%
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%
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%**
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%

*** Sample size less than 5**

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



SELF-CATERING UNIT OCCUPANCY	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14
All ER Self-catering	28.01%	25.64%	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%	62.92%	90.48%	78.71%	55.67%	31.03%
Torquay	*	*	15.30%	*	15.00%	38.92%	40.78%	59.87%	57.30%	*	*	*	*
Paignton	34.90%	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 November 2014 English Riviera self-catering unit occupancy was higher than Devon and Dorset.

Key comparisons;
South West – ER performance was higher than the regional average during February, May, June, August, September & October 2014.
Cornwall – ER performance was higher than Cornwall during February, May, June, August & September 2014.
Devon – ER performance was higher than Devon during January, June, August, September & November 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
South West	16.89%	12.88%	30.19%	61.36%	39.19%	47.15%	74.57%	87.78%	55.37%	52.74%	31.17%
Former Avon	*	*	*	*	*	*	*	*	*	*	*
Cornwall	15.25%	12.77%	36.89%	66.71%	28.26%	63.33%	70.68%	87.70%	48.20%	*	34.21%
Devon	12.76%	35.44%	33.21%	58.18%	51.69%	63.96%	80.33%	87.70%	67.21%	57.68%	30.63%
English Riviera	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**	**90.48%**	**78.71%**	**55.67%**	**31.03%**
Dorset	19.71%	7.40%	13.98%	48.33%	63.30%	14.01%	68.96%	97.03%	71.85%	45.63%	19.27%
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%
Wiltshire	*	0.00%	*	*	*	*	*	*	*	*	*

*** Sample size less than 5**

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

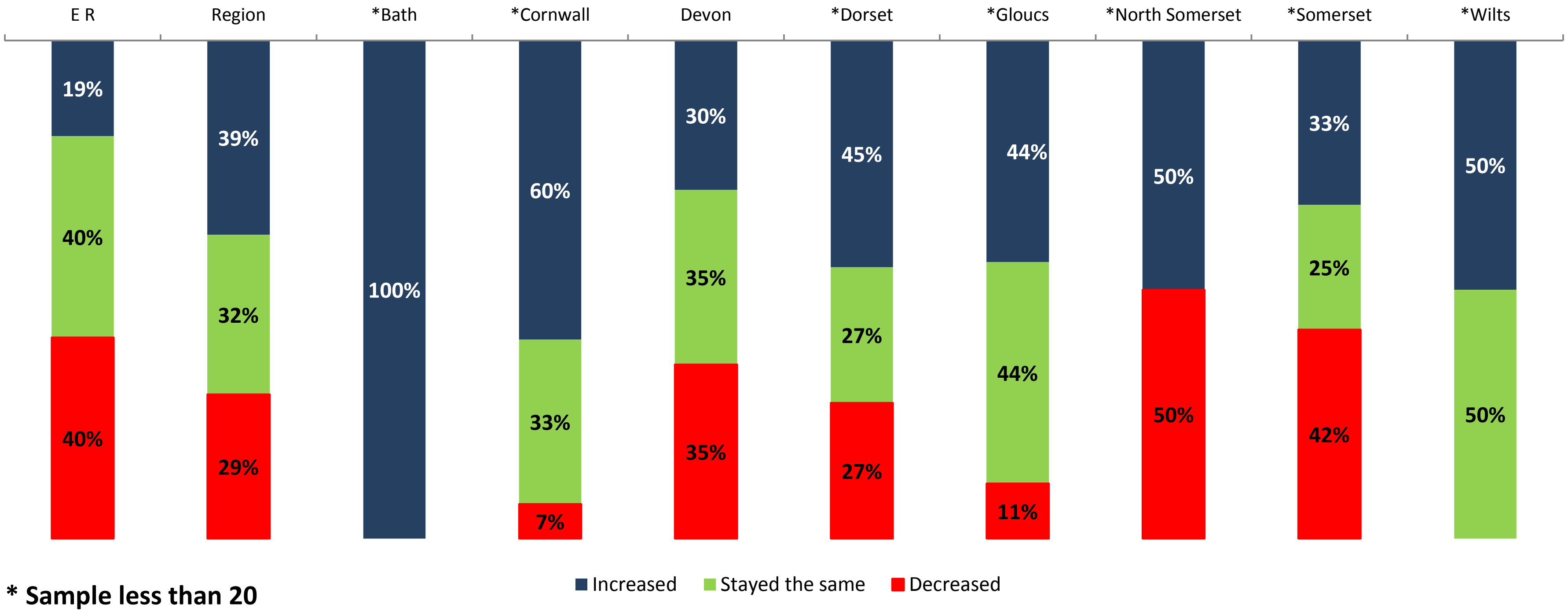
Key comparisons;
All ER Self-catering – Higher than the regional average during February, May, June, August, September & October 2014.
ER Self-catering (not including Holiday Parks) – Higher than the regional average in all months except January, April, July & November 2014.

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
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%**
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%
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%**
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%
ER Holiday Park	*	*	*	*	*	*	*	*	*	*	*
SW Holiday Park	*	*	32.47%	66.33%	28.41%	*	56.51%	*	*	*	*

*** Sample size less than 5**

Performance – Turnover (2014-2013)

59% of English Riviera businesses reported increased (19%) or level turnover (40%) during November 2014 compared with November 2013, again a lower proportion when compared with the region as a whole during the same period (71%). 40% of English Riviera businesses reported decreased turnover during November 2014 (29% regionally).



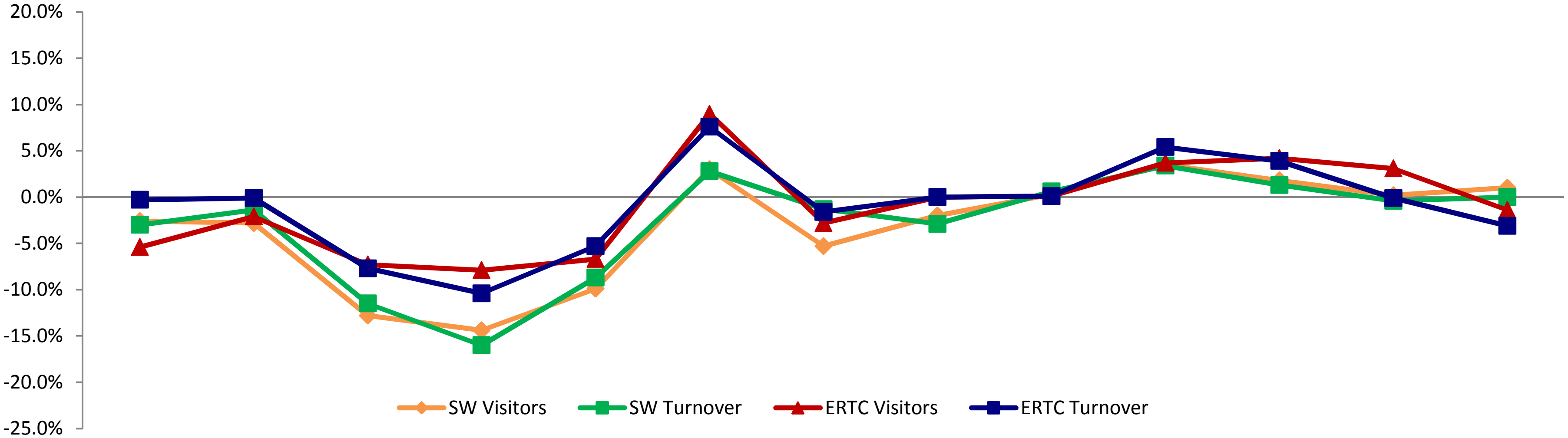
*** Sample less than 20**

Turnover	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	19%	39%	100%	-	-	60%	30%	45%	44%	50%	33%	50%
Stayed the same	40%	32%	-	-	-	33%	35%	27%	44%	-	25%	50%
Decreased	40%	29%	-	-	-	7%	35%	27%	11%	50%	42%	-
Base	42	119	<5	-	-	15	63	11	9	<5	12	<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 November 2014 English Riviera businesses reported a decrease of -1.4% in terms of visitors along with a decrease in turnover of -3.1% compared with November 2013 and compared with +1.0% and 0.0% in terms of visitors and turnover respectively during the same period for the region as a whole.

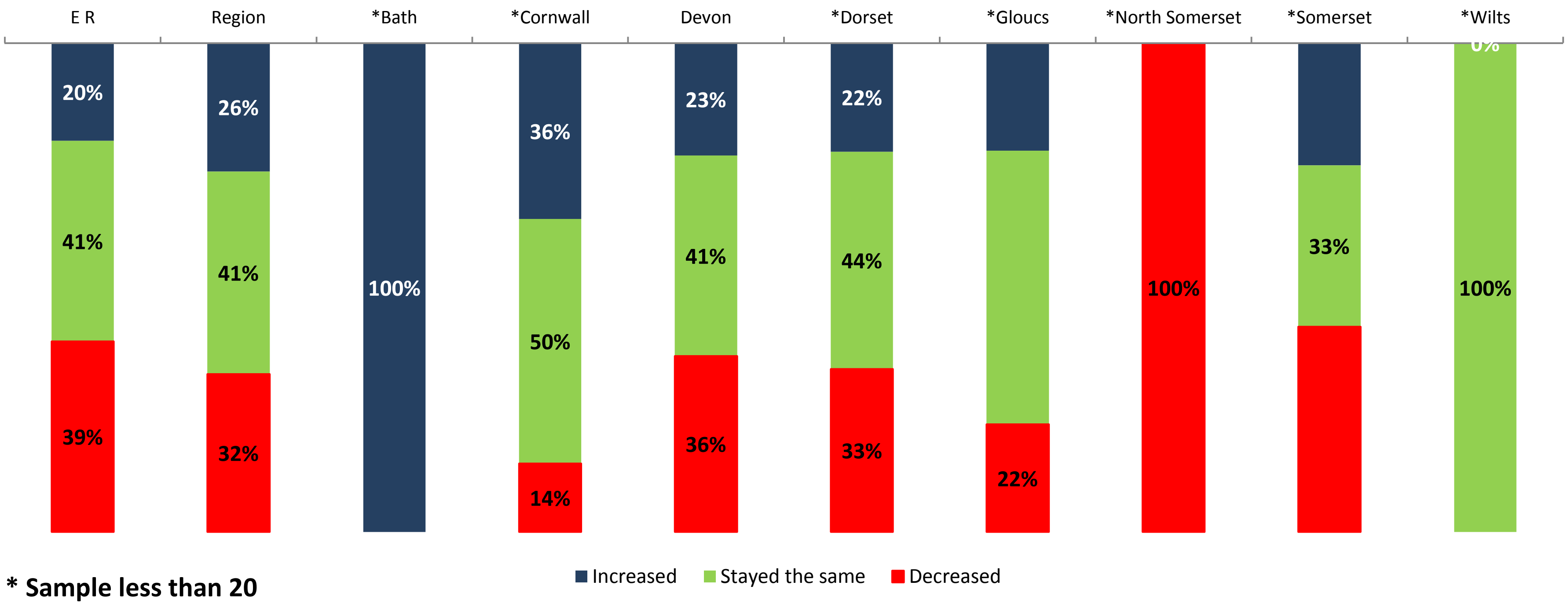
ERTC	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14
Visitors	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%	9.0%	-2.8%	0.0%	0.1%	3.7%	4.2%	3.1%	-1.4%
Turnover	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%	7.6%	-1.6%	0.0%	0.1%	5.4%	3.9%	-0.1%	-3.1%



Region	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14	Nov-14
Visitors	-2.6%	-2.8%	-12.8%	-14.4%	-9.9%	3.0%	-5.3%	-2.0%	0.3%	3.5%	1.8%	0.2%	1.0%
Turnover	-3.0%	-1.4%	-11.5%	-16.0%	-8.7%	2.8%	-1.3%	-2.9%	0.6%	3.4%	1.3%	-0.4%	0.0%

Performance – Profitability (2014-2013)

61% of all English Riviera businesses reported increased (20%) or level profitability (41%) for the month, a slightly lower proportion when compared to the SW region as a whole during the same period (67%). 39% of businesses reported their profitability as being lower than during November 2013 (32% of SW businesses).



*** Sample less than 20**

Profitability	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	20%	26%	100%	-	-	36%	23%	22%	22%	-	25%	-
Stayed the same	41%	41%	-	-	-	50%	41%	44%	56%	-	33%	100%
Decreased	39%	32%	-	-	-	14%	36%	33%	22%	100%	42%	-
Base	41	114	<5	-	-	14	61	9	9	<5	12	<5

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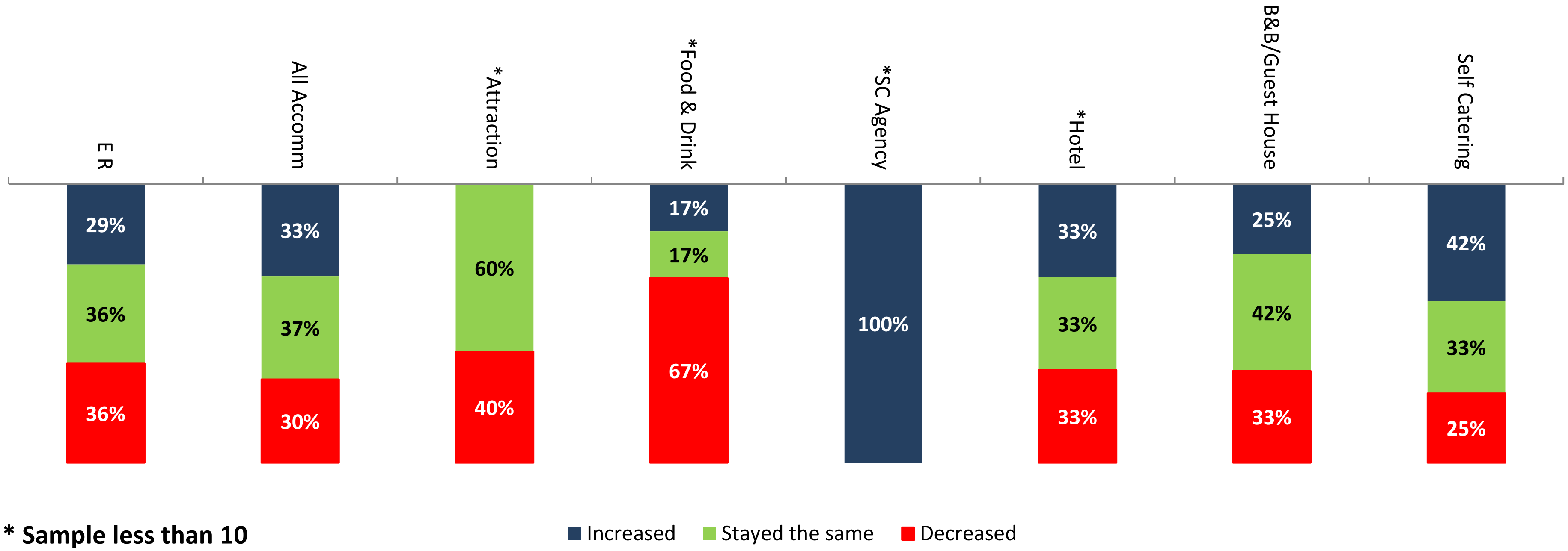
Business Type Performance

Business Type Performance – Visitor numbers (2014-2013)

70% of all accommodation providers reported increased (33%) or level (37%) visitor numbers for November 2014. 75% of Self Catering operators and 67% of B&B/Guest Houses reported increased or level visitor numbers for November 2014 compared with the same time last year. 25% of Self Catering operators and 33% of B&B/Guest Houses reported decreased visitor numbers.

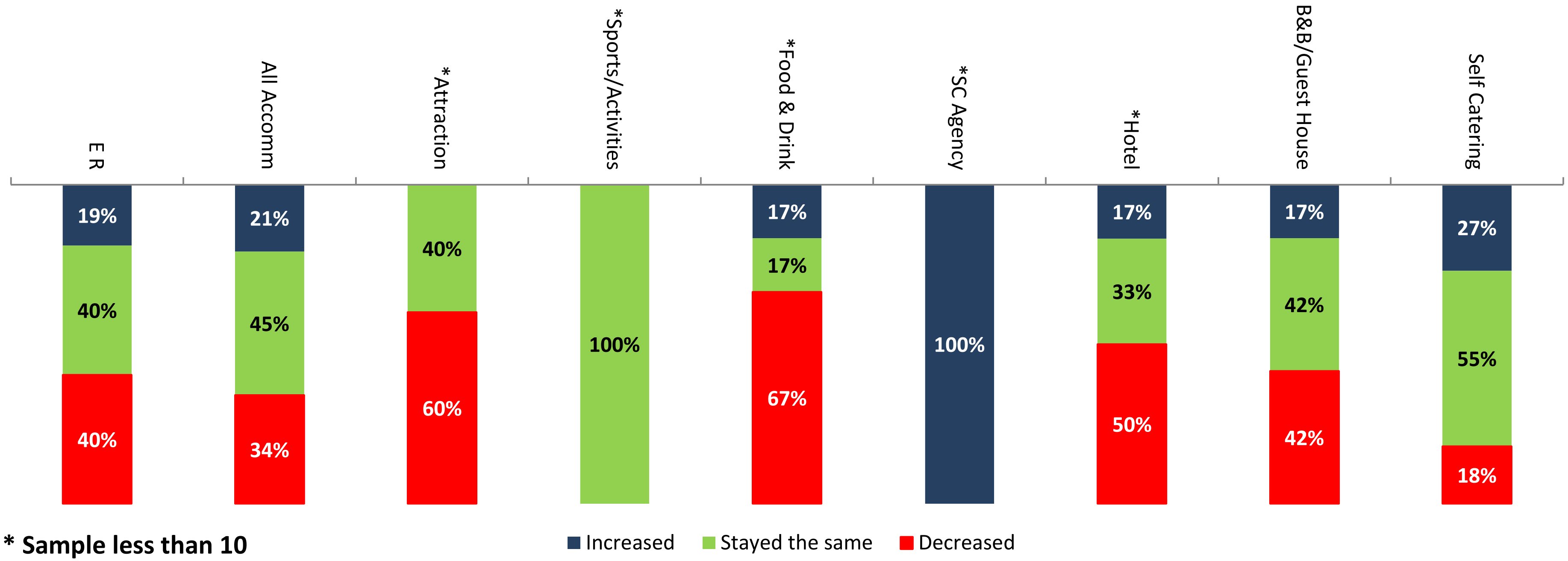


*** Sample less than 10**

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	29%	33%	-	-	17%	-	-	100%	-	33%	25%	42%	-	-
Stayed the same	36%	37%	60%	-	17%	-	-	-	-	33%	42%	33%	-	-
Decreased	36%	30%	40%	-	67%	-	-	-	-	33%	33%	25%	-	-
Base	42	30	5	-	6	-	-	<5	-	6	12	12	-	-

Business Type Performance – Turnover (2014-2013)

66% of all accommodation providers reported increased (21%) or level turnover (45%) for November 2014. 82% of Self Catering operators and 59% of B&B/Guest Houses reported increased or level turnover for November 2014 compared with the same time last year. 18% of Self Catering operators and 42% of B&B/Guest Houses reported decreased turnover.

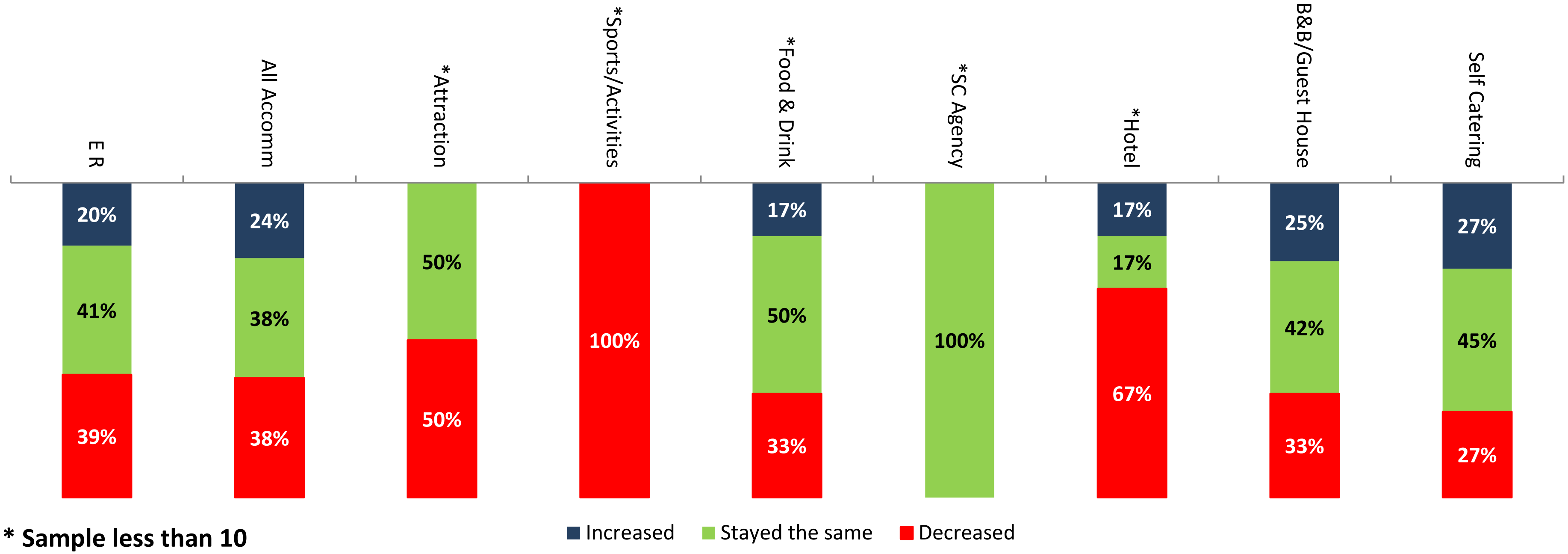


*** Sample less than 10**

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	19%	21%	-	-	17%	-	-	100%	-	17%	17%	27%	-	-
Stayed the same	40%	45%	40%	100%	17%	-	-	-	-	33%	42%	55%	-	-
Decreased	40%	34%	60%	-	67%	-	-	-	-	50%	42%	18%	-	-
Base	42	29	5	<5	6	-	-	<5	-	6	12	11	-	-

Business Type Performance – Profitability (2014-2013)

62% of all accommodation providers reported increased (24%) or level (38%) profitability for November 2014. 72% of Self Catering operators and 67% of B&B/Guest Houses reported increased or level profitability for November 2014 compared with the same time last year. 27% of Self Catering operators and 33% of B&B/Guest Houses 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	20%	24%	-	-	17%	-	-	-	-	17%	25%	27%	-	-
Stayed the same	41%	38%	50%	-	50%	-	-	100%	-	17%	42%	45%	-	-
Decreased	39%	38%	50%	100%	33%	-	-	-	-	67%	33%	27%	-	-
Base	41	29	<5	<5	6	-	-	<5	-	6	12	11	-	-

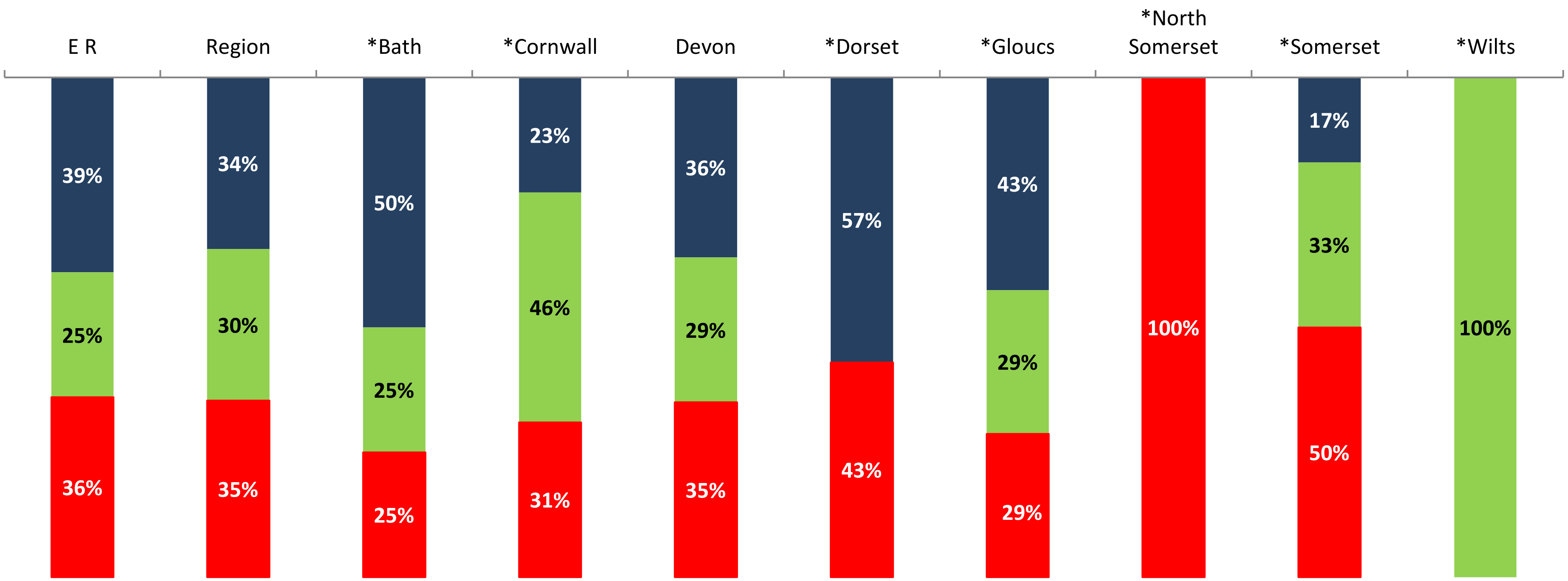
English Riviera Tourism Monitor

November 2014

Looking Ahead

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

64% of English Riviera businesses reported that their booking levels for December 2014 were looking better than (39%) or the same as (25%) December 2013, the same proportion as the region as a whole and compared with 65% of businesses in Devon.

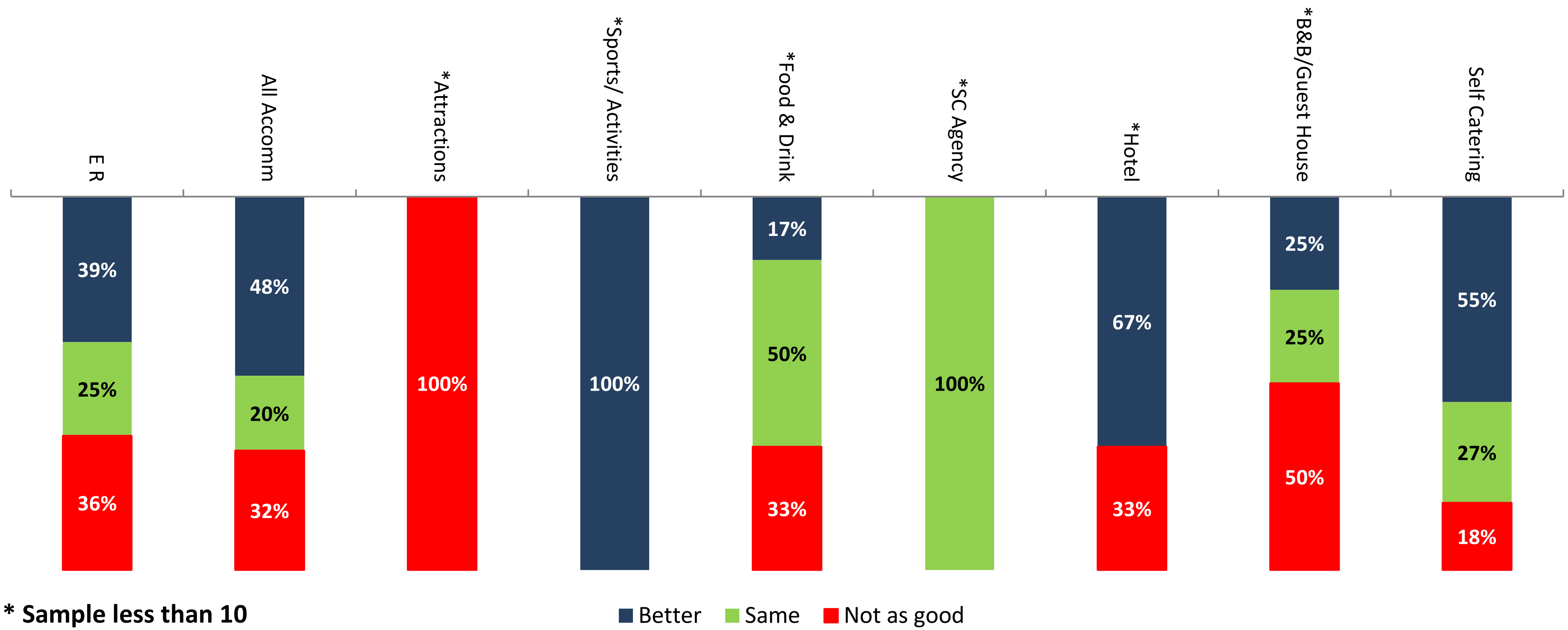


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Better	39%	34%	50%	-	-	23%	36%	57%	43%	-	17%	-
The same	25%	30%	25%	-	-	46%	29%	-	29%	-	33%	100%
Not as good	36%	35%	25%	-	-	31%	35%	43%	29%	100%	50%	-
Base	36	102	<5	-	-	13	55	7	7	<5	12	<5

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

68% of all accommodation providers reported that their December 2014 booking levels were looking better than (48%) or the same as (20%) last year. 82% of Self Catering operators reported that their booking levels for December 2014 were looking better than or the same as December 2013.

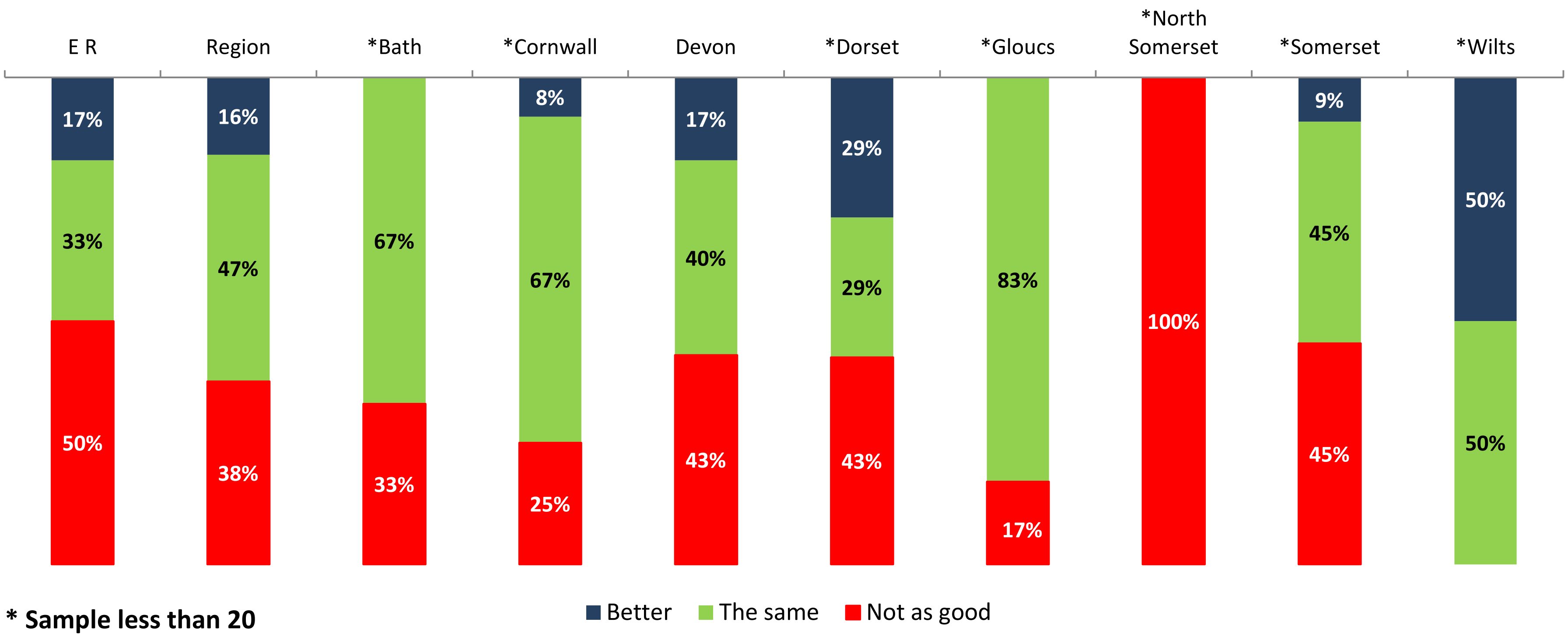


*** Sample less than 10**

Booking levels	ER	Accomm	*Attraction	*Sports/ Activities	*Food & Drink	*Retail	*Travel/ Transport	*SC Agency	*Other	*Hotel	*B&B/ Guest House	Self Catering	*Holiday Park	*Caravan/ campsite
Better	39%	48%	-	100%	17%	-	-	-	-	67%	25%	55%	-	-
Same	25%	20%	-	-	50%	-	-	100%	-	-	25%	27%	-	-
Not as good	36%	32%	100%	-	33%	-	-	-	-	33%	50%	18%	-	-
Base	36	25	<5	<5	6	-	-	<5	-	6	8	11	-	-

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

50% of English Riviera businesses reported that their booking levels for January 2015 were looking better than (17%) or the same as (33%) January 2014, compared with 63% of businesses within the region as a whole and 57% of businesses in Devon. 50% of businesses reported that their January 2015 booking levels were looking worse than in 2014 compared with 38% of businesses in the region as a whole and 43% in Devon.

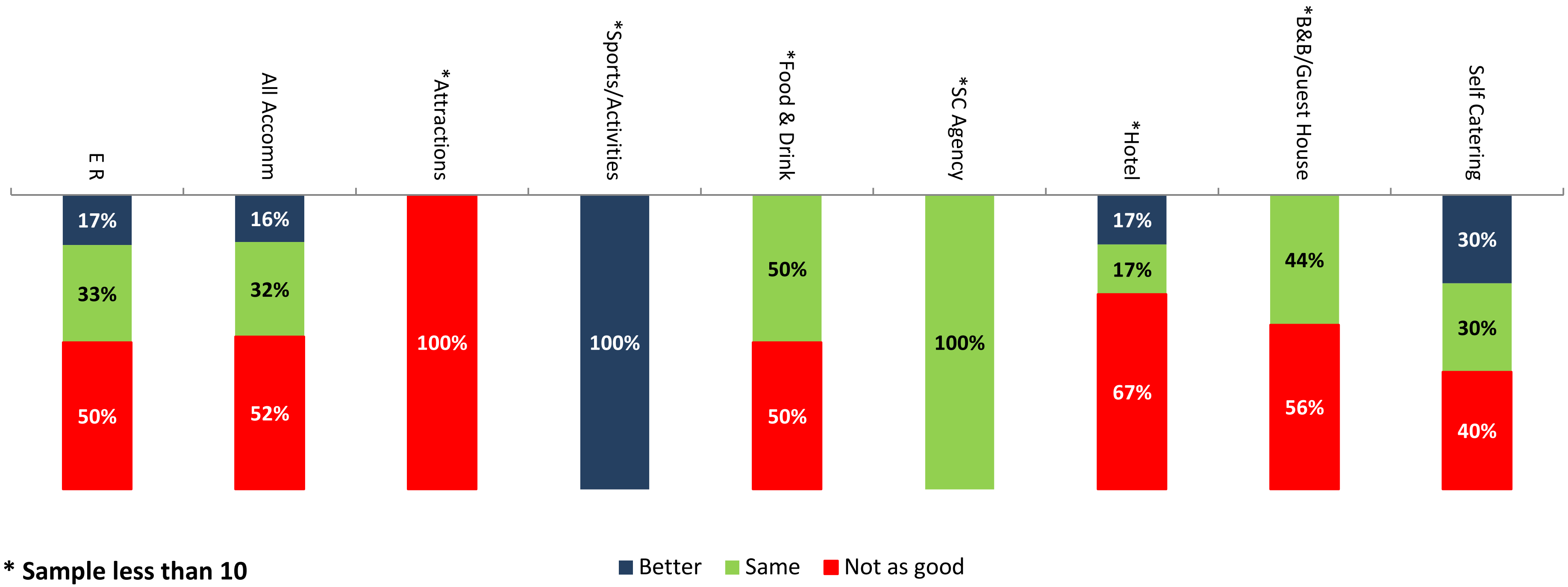


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Better	17%	16%	-	-	-	8%	17%	29%	-	-	9%	50%
The same	33%	47%	67%	-	-	67%	40%	29%	83%	-	45%	50%
Not as good	50%	38%	33%	-	-	25%	43%	43%	17%	100%	45%	-
Base	30	90	<5	-	-	12	47	7	6	<5	11	<5

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

52% of all accommodation providers reported that their January 2015 booking levels were looking worse than during January 2014 whilst 48% said that they were looking better (16%) or the same (32%). 60% of Self Catering operators reported that their booking levels were looking better than or the same as January 2014, whilst 40% said they were looking worse.



*** Sample less than 10**

Booking levels	ER	Accomm	*Attraction	*Sports/ Activities	*Food & Drink	*Retail	*Travel/ transport	*SC Agency	*Other	*Hotel	*B&B/ Guest House	Self Catering	*Holiday Park	*Caravan/ campsite
Better	17%	16%	-	100%	-	-	-	-	-	17%	-	30%	-	-
Same	33%	32%	-	-	50%	-	-	100%	-	17%	44%	30%	-	-
Not as good	50%	52%	100%	-	50%	-	-	-	-	67%	56%	40%	-	-
Base	30	25	<5	<5	<5	-	-	<5	-	6	9	10	-	-

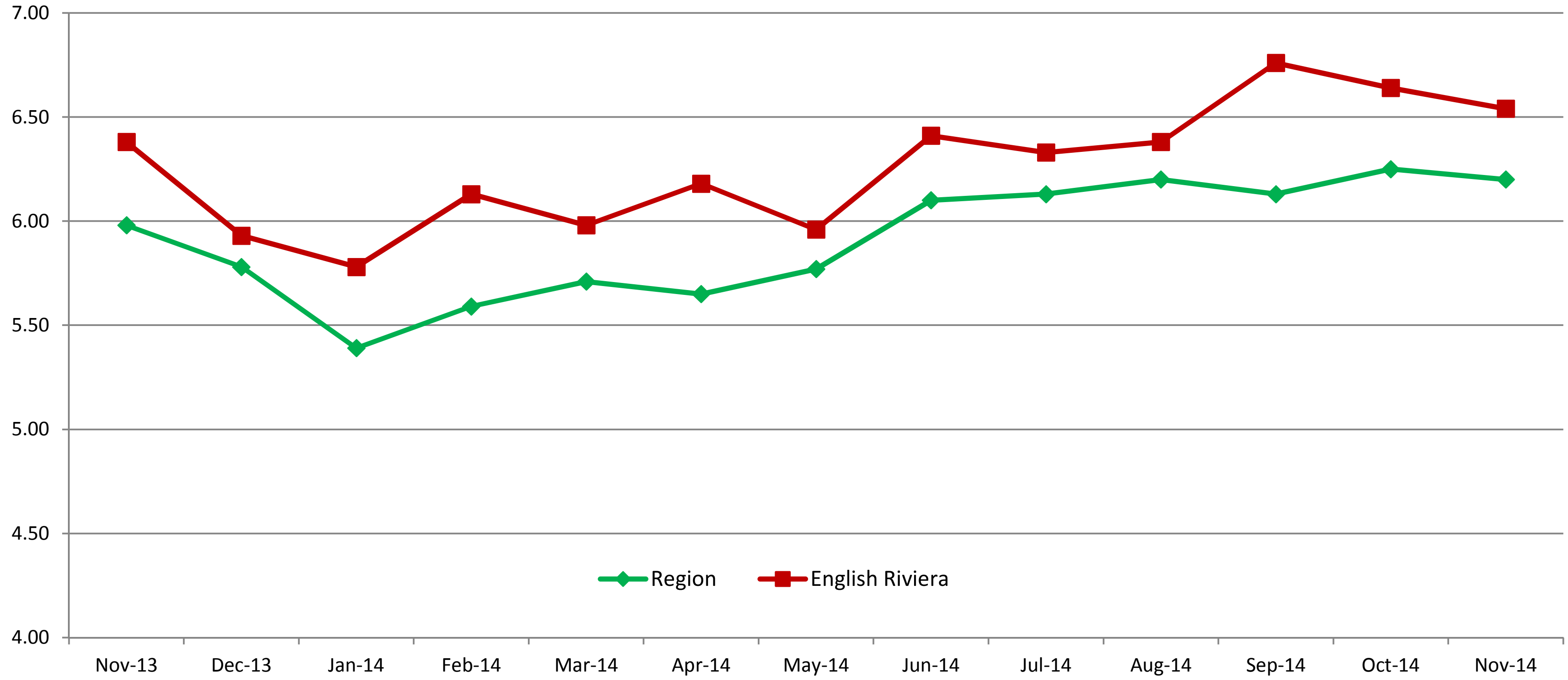
English Riviera Tourism Monitor

November 2014

Business Optimism

Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.54 for November 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 (6.64) but nonetheless the third highest optimism score recorded over the last 12 months. It also compares favourably with the South West regional score for November 2014 of 6.20.



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

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.

Bad council decisions on changes to parking space availability in the area continues to discourage visitors

The low number of people coming to the bay and the low prices they expect to pay during the winter months do not make it viable to remain open.

Keep getting the footfall; its then up to us!

Cost of gas, electric and water. We could trade longer in the year if the VAT threshold was higher or at least graduated like new stamp duty.

Need some commitment to working together, winter parking, is a good price, but wasted if customers not informed

Proposal to turn the old Melbourne Hotel into a HMO will have a big negative impact in 2015 if the planning succeeds.

Our business has improved. We have put a lot of work and money into the business over 5 years and have seen a huge increase in turnover.

Brixham is on the up.

The reduction in budget for the ERTC is without doubt going to have an impact on their ability to market the bay, particularly on an international basis. I have concerns over the influx of charity shops on the high street, I have nothing at all against charity shops, but visiting the high street needs to be an enriching diverse experience, with destination shops, independent shops and national brands. This mix will entice shoppers on to the high street to spend their money, having too much of any individual type of outlet is bad for the experience and ultimately bad for the future of the existing / new retailers and the future of the town.

Every effort should be directed toward 'out of season' initiatives. Of course main season marketing activity is crucial, but enhanced 'out of season' promotions/events would have a positive knock-on effect on, and add impetus to, the on-going spring and summer season activity.

'Gove' effect.

The tourism update event was very helpful

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

The South West Research Company