

English Riviera Tourism Monitor



October 2014

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

December 2014



Executive Summary

Compared to October 2013 businesses reported that:

October 2014 Visitor levels:

Increased 37% / Stayed the same 27% / Decreased 37%

Estimated actual change in visitors +3.1%

October 2014 Turnover levels:

Increased 32% / Stayed the same 26% / Decreased 42%

Estimated actual change in turnover -0.1%

October 2014 Profitability was:

Higher 32% / Stayed the same 38% / Decreased 30%

November 2014 Outlook is:

Better 26% / Same as last year 40% / Not as good 33%

December 2014 Outlook is:

Better 13% / Same as last year 53% / Not as good 34%

Optimism

Optimism score is 6.64 out of a possible 10

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English Riviera Tourism Monitor



October 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

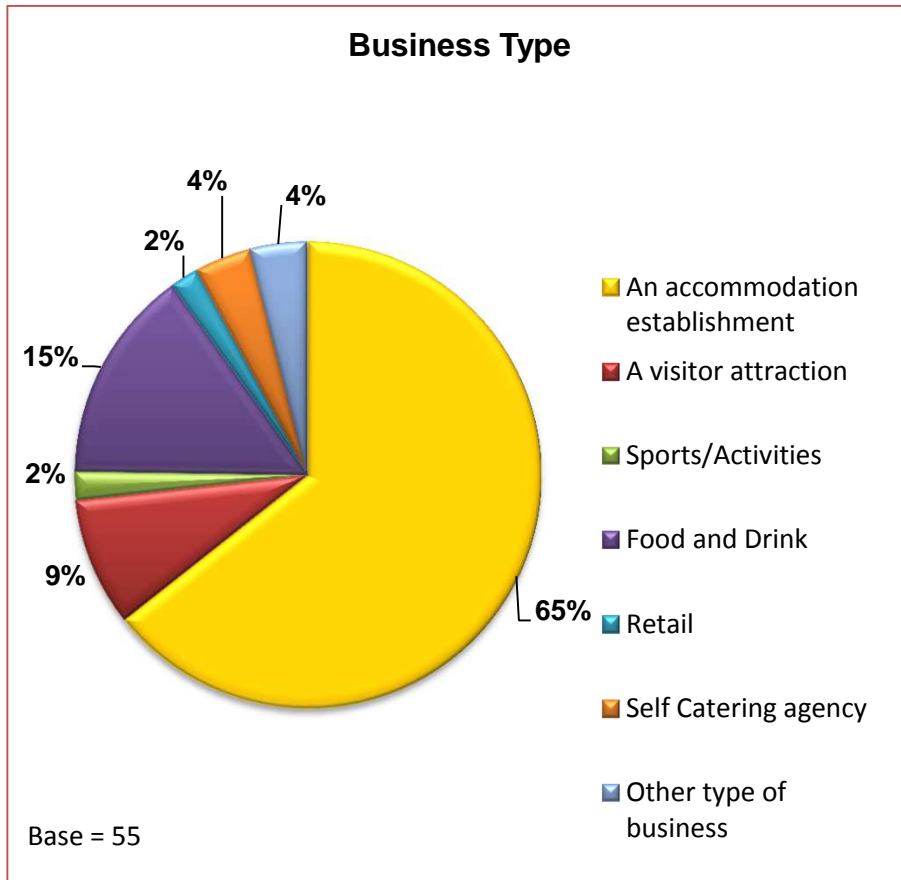


October 2014

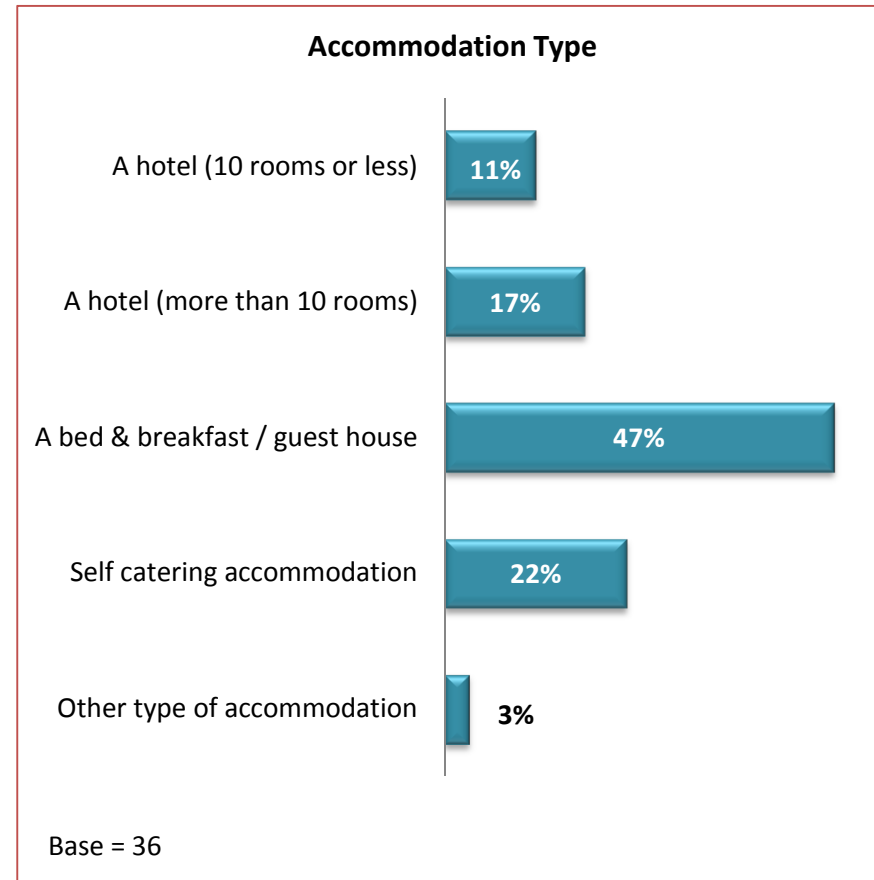
Sample Profile



Business Type

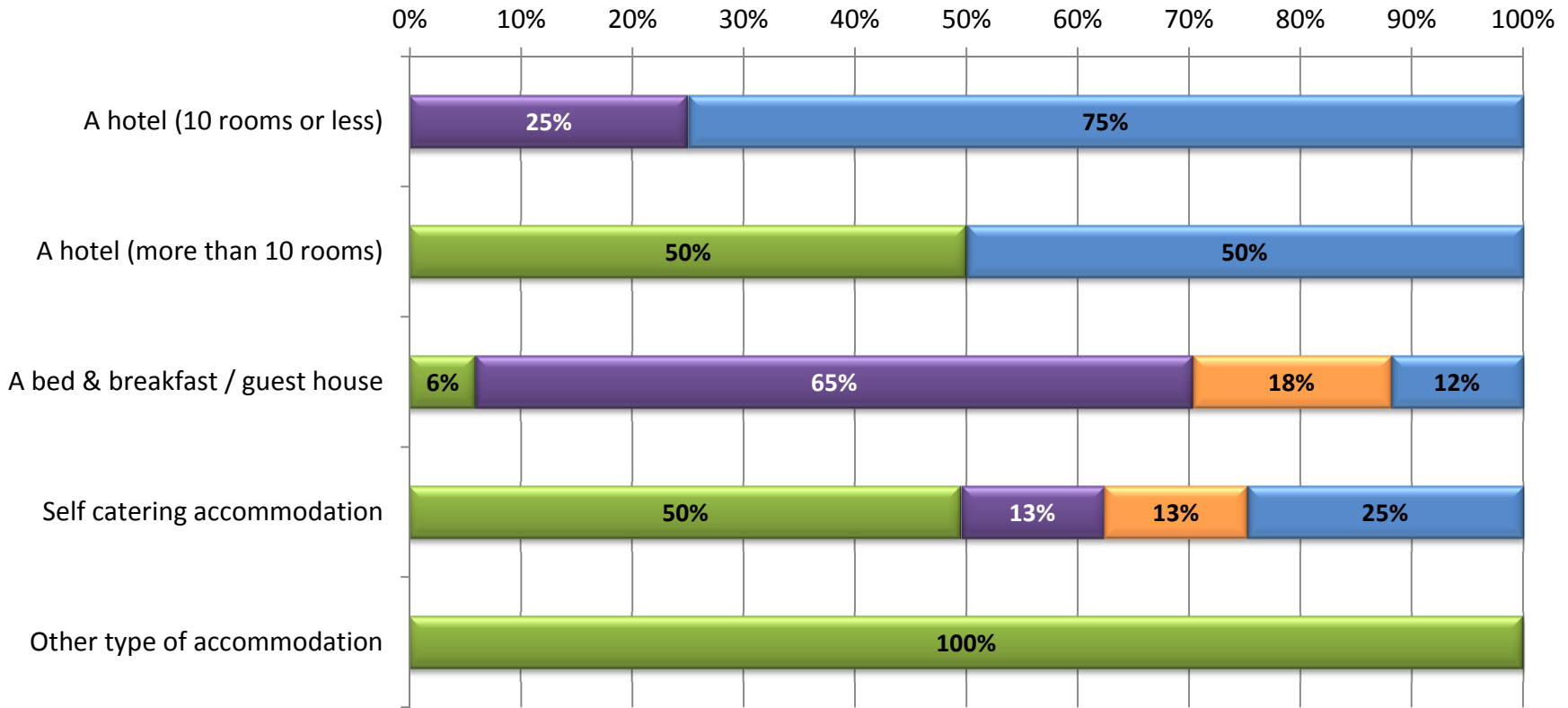


Accommodation providers accounted for 65% of responses with Food & Drink establishments and Visitor Attractions accounting for 15% and 9% respectively.



Serviced accommodation providers accounted for 75% of accommodation responses and Self catering accommodation a further 22%.

Accommodation Type and Rating

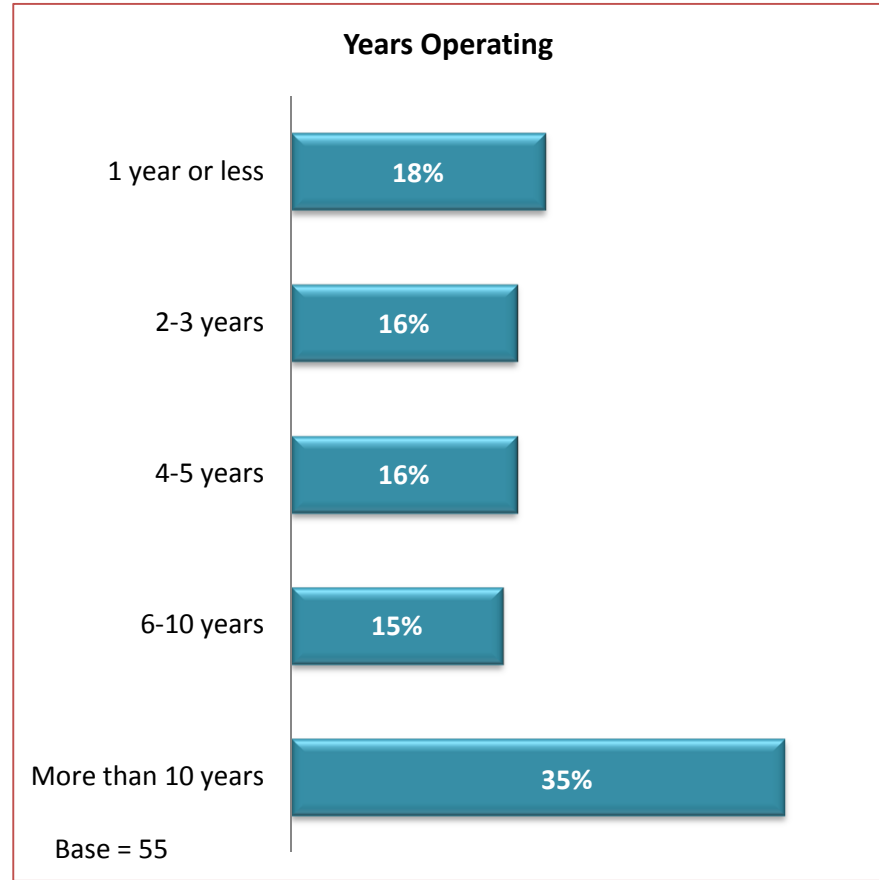
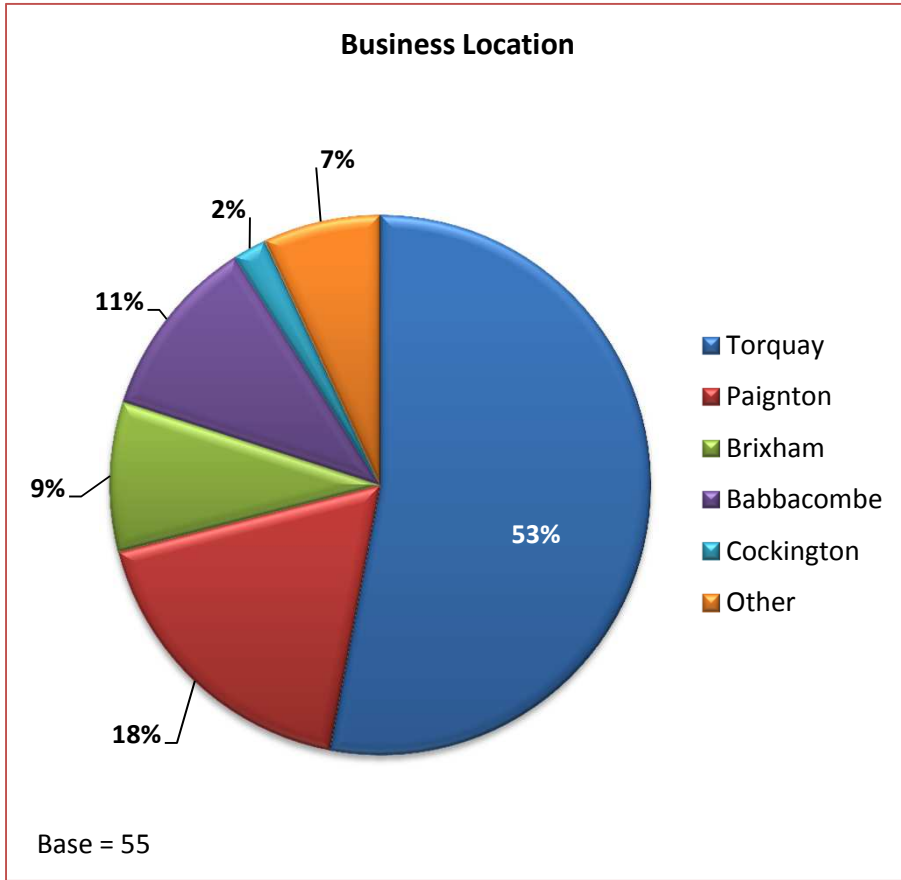


Base = 36

■ 1 star ■ 2 stars ■ 3 stars ■ 4 stars ■ 5 stars ■ None

75% of hotels with 10 rooms or less, 50% of hotels with more than 10 rooms and 25% of Self catering operators responding to the survey were not quality graded compared to 12% of B&B/Guest Houses.

Business Location and Years Operating



Torquay businesses accounted for 53% of responses with 18% from Paignton. A further 11% of businesses were from Babbacombe, 9% from Brixham and 2% from Cockington. A further 7% of businesses were based elsewhere in the resort.

50% of businesses have been operating for more than 6 years.

English Riviera Tourism Monitor



October 2014

The Month in Context

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October 2014 – The Month in Context

The UK Weather

October came as quite a contrast to the previous month, as the weather became unsettled and wet by the 3rd and remained so through the majority of the month, interspersed with only short periods of drier weather. With winds frequently from the south, this October was another month with well above average temperatures, and notably warm on the 31st.

The provisional UK mean temperature was 11.1 °C, which is 1.6 °C above the 1981-2010 long-term average. This made it the equal-tenth warmest October for the UK in a series since 1910, and only marginally cooler than the Octobers of 2011 and 2013. Rainfall was above average in some areas, particularly across much of Scotland and Cumbria, with double the long-term average around the Solway Firth and the Isle of Man. The overall UK rainfall was 125% of average. Sunshine was rather below normal overall, with a UK figure of 91%, and the sunniest areas relative to average were Northern Ireland, the Western Isles of Scotland and the east coast of England.

Weather impacts

The month was generally unsettled, with various events causing impacts in certain areas. One particularly active weather system crossed the UK during the night of 5th/6th, with strong winds and large amounts of rainfall. Persistent rain moved north into southern England and the Midlands on the evening of Sunday 12th and into Monday 13th, with some heavy showery bursts, enough to cause localised flooding.

The remnants of Hurricane Gonzalo blew into the UK on the night of the 20th/21st, with warnings of disruption due to strong winds as well as localised heavy rainfall, most especially over the northern half of the UK. With trees still in leaf some disruption and damage was caused by falling trees and a woman was killed by a falling tree in Knightsbridge (London). Beginning on the 25th, there was heavy frontal rainfall over much of western Scotland, giving some unusually high totals over a three-day period with 200 mm in some places during this time. There were consequent concerns over flooding leading to an Amber warning for the 25th, and some disruption caused by landslides.

October 2014 – The Month in Context

The UK Economy

The UK remains on track to be the fastest growing G7 economy this year despite new figures showing that GDP growth slowed in the third quarter. A rise of 0.7% – a slowdown from 0.9% in the second quarter – was in line with most forecasts. But after recent economic indicators showing a weaker housing market, and slower manufacturing and consumer spending, some had feared growth could be weaker. Relief in financial markets at the figures, which confirmed seven consecutive quarters of growth, gave the pound a boost.

Economists said that while growth remained strong, it was unlikely to return to the pace seen earlier in the year. “We expect the recovery to soften a little further in the fourth quarter as the single currency area records little growth while a confluence of factors – principally the potential for rate hikes in the next 12 months and political uncertainty – drag a little on domestic growth,” said Rob Wood, chief UK economist at the Berenberg bank. “For now it is onwards and upwards for the UK, but we worry about the downside risks in the near term.”

Nonetheless, Britain is expected to be the fastest-growing economy among the G7 nations this year with the International Monetary Fund (IMF) predicting a GDP increase of 3.2% compared with the US at 2.2% in second place. The Office for National Statistics said growth in the UK’s dominant services sector slowed in the July to September quarter and manufacturing grew at the slowest pace for 18 months.

Services remained the biggest driver of growth, followed by production, which includes manufacturing. Construction growth picked up in the third quarter, chiming with reports that house building is at its strongest since 2007. Compared with a year ago, GDP was up 3%, down from annual growth of 3.2% in the second quarter.

English Riviera Tourism Monitor

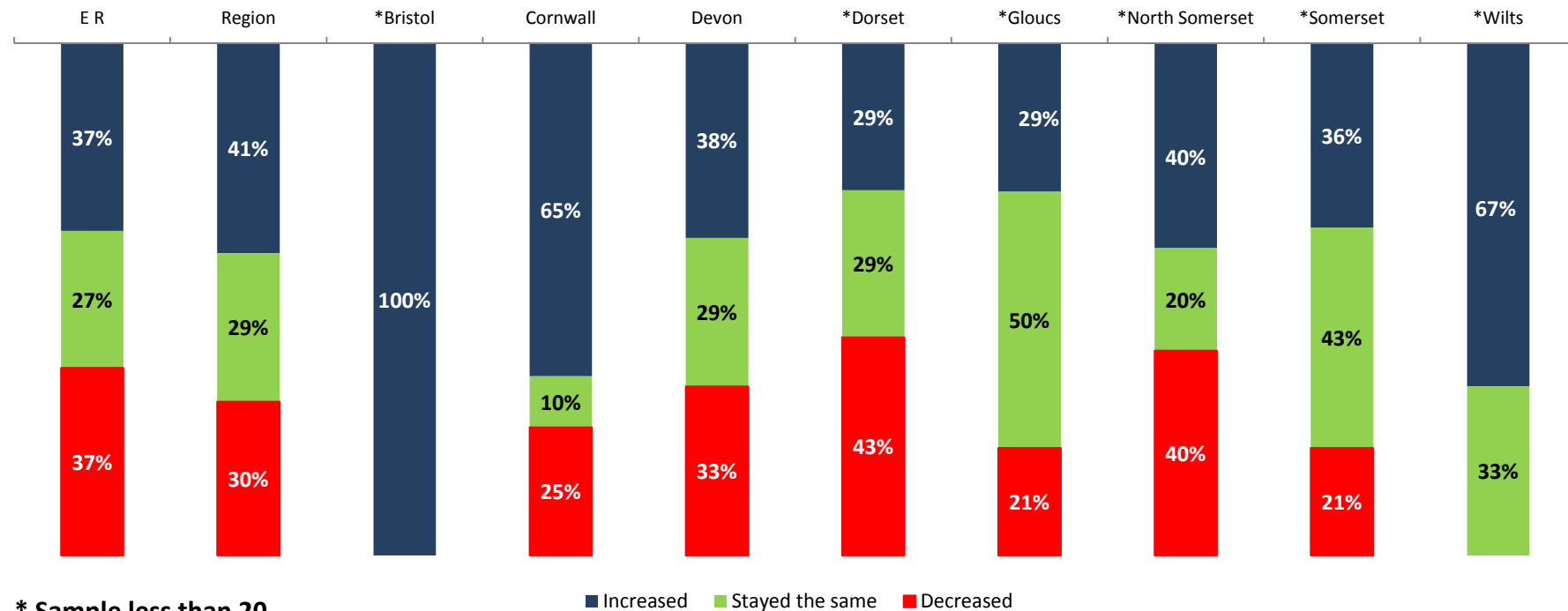
October 2014

Performance



Performance – Visitor Numbers (2014-2013)

64% of English Riviera businesses reported that their visitor numbers had increased or stayed the same compared with October 2013 – a slightly lower proportion when compared against the region as a whole during the same period (70%). 37% of businesses indicated that their visitor numbers had decreased compared with the same time last year (30% regionally).



Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	37%	41%	-	-	100%	65%	38%	29%	29%	40%	36%	67%
Stayed the same	27%	29%	-	-	-	10%	29%	29%	50%	20%	43%	33%
Decreased	37%	30%	-	-	-	25%	33%	43%	21%	40%	21%	-
Base	49	139	-	-	<5	20	63	14	14	10	14	<5

Performance – Estimated occupancy levels October 2014

The slides to follow show the estimated occupancy for October 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		
October-14	% RM OCCUPANCY	SAMPLE
English Riviera	69.30%	27
All hotels	73.76%	10
Hotel 10 rooms or less	36.90%	<5
Hotel more than 10 rooms	75.35%	6
B&B	31.72%	9
Guest House	42.91%	8
Torquay	73.21%	15
Paignton	46.13%	5
Brixham	70.44%	<5
Babbacombe	34.75%	<5
**Cockington	0.00%	0
Other English Riviera	41.94%	<5
Devon	67.70%	31
South West	67.65%	52

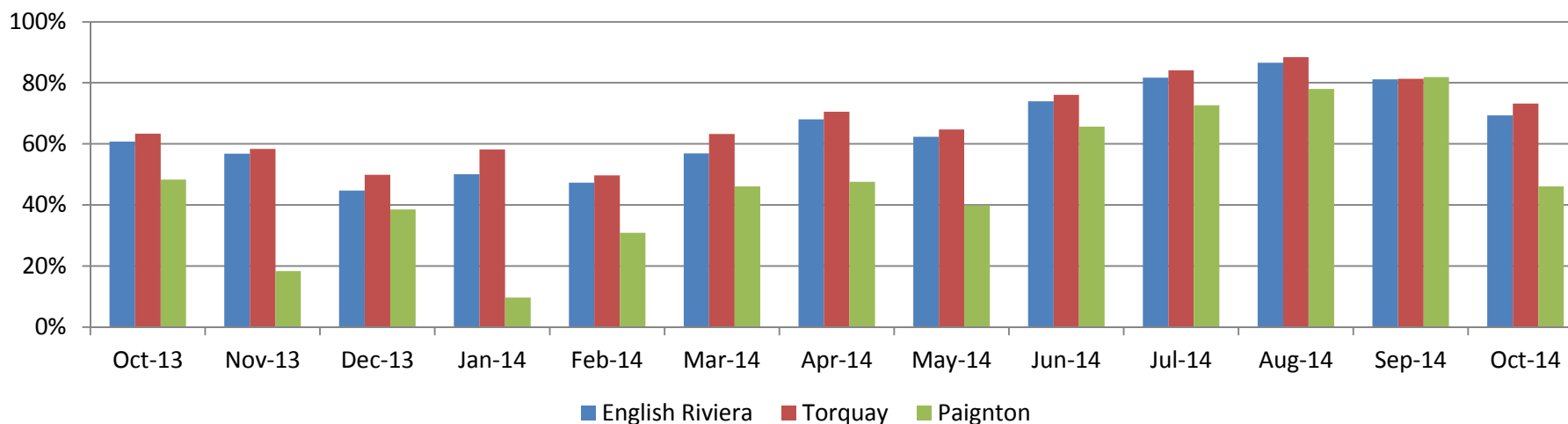
English Riviera serviced room occupancy was calculated at 69.30% for October 2014 compared with an average of 67.65% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for October 2014 was calculated at 55.67% compared with 52.74% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY		
October-14	% UNIT OCC	SAMPLE
English Riviera	55.67%	6
Self-catering accommodation	55.67%	6
Holiday Park	0.00%	0
Torquay	31.41%	<5
Paignton	89.58%	<5
Brixham	0.00%	0
Babbacombe	0.00%	<5
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	57.68%	10
South West	52.74%	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	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	Jul-14	Aug-14	Sept-14	Oct-14
English Riviera	60.75%	56.83%	44.72%	50.07%	47.32%	56.90%	68.04%	62.36%	73.97%	81.71%	86.59%	81.14%	69.30%
Torquay	63.34%	58.40%	49.88%	58.22%	49.69%	63.22%	70.50%	64.72%	76.09%	84.07%	88.44%	81.33%	73.21%
Paignton	48.34%	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 October 2014 English Riviera serviced occupancy was higher than all comparison areas with the exception of Cornwall.

Key comparisons;

South West – ER performance was higher than the regional average during all months except March, May and June 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	July-14	Aug-14	Sept-14	Oct-14
South West	46.15%	47.12%	57.12%	63.21%	62.73%	75.60%	81.27%	82.17%	75.79%	67.65%
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%
English Riviera	50.07%	47.32%	56.90%	68.04%	62.36%	73.97%	81.71%	86.59%	81.14%	69.30%
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%	*	*

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.

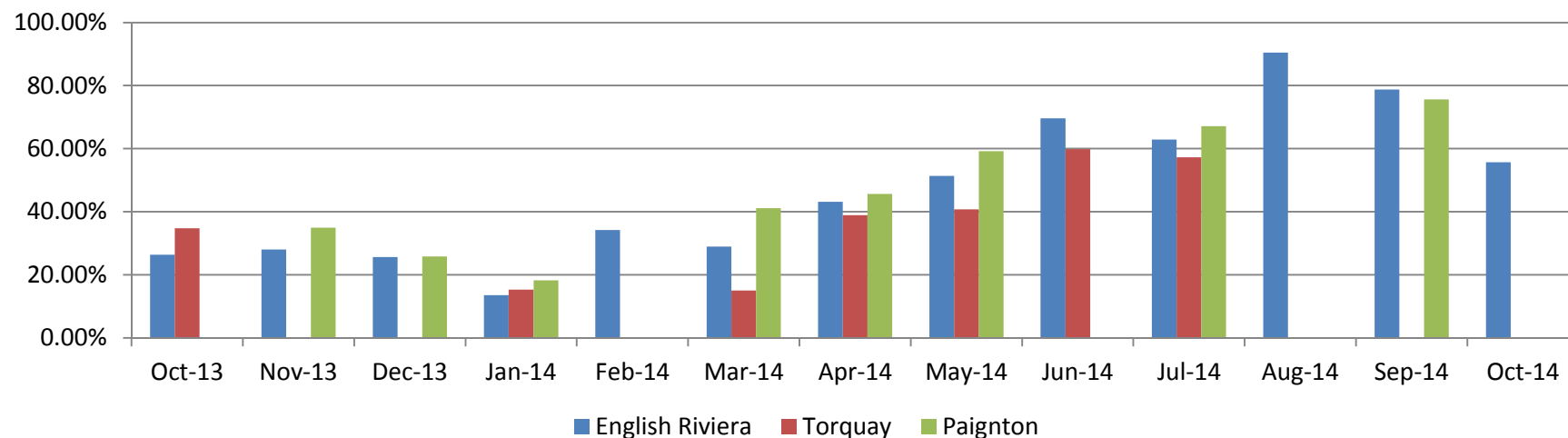
ER Hotels (more than 10 rooms) - Higher than the regional average during all months except February and March 2014.

ER B&B/Guest House – Lower than the regional average in all months except July and August 2014.

<u>SERVICED ROOM OCCUPANCY</u>	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14	Oct-14
All ER hotels	55.42%	52.05%	61.01%	71.96%	67.17%	77.30%	84.54%	88.28%	84.53%	73.76%
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%
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%
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%
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%

* Sample size less than 5

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



SELF-CATERING UNIT OCCUPANCY	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14
All ER Self-catering	26.37%	28.01%	25.64%	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%	62.92%	90.48%	78.71%	55.67%
Torquay	34.79%	*	*	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%	*
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 October 2014 English Riviera self-catering unit occupancy was higher than Dorset and the South West region as a whole.

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 2014.

<u>SELF-CATERING UNIT OCCUPANCY</u>	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14	Oct-14
South West	16.89%	12.88%	30.19%	61.36%	39.19%	47.15%	74.57%	87.78%	55.37%	52.74%
Former Avon	*	*	*	*	*	*	*	*	*	*
Cornwall	15.25%	12.77%	36.89%	66.71%	28.26%	63.33%	70.68%	87.70%	48.20%	*
Devon	12.76%	35.44%	33.21%	58.18%	51.69%	63.96%	80.33%	87.70%	67.21%	57.68%
English Riviera	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%	62.92%	90.48%	78.71%	55.67%
Dorset	19.71%	7.40%	13.98%	48.33%	63.30%	14.01%	68.96%	97.03%	71.85%	45.63%
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%
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.

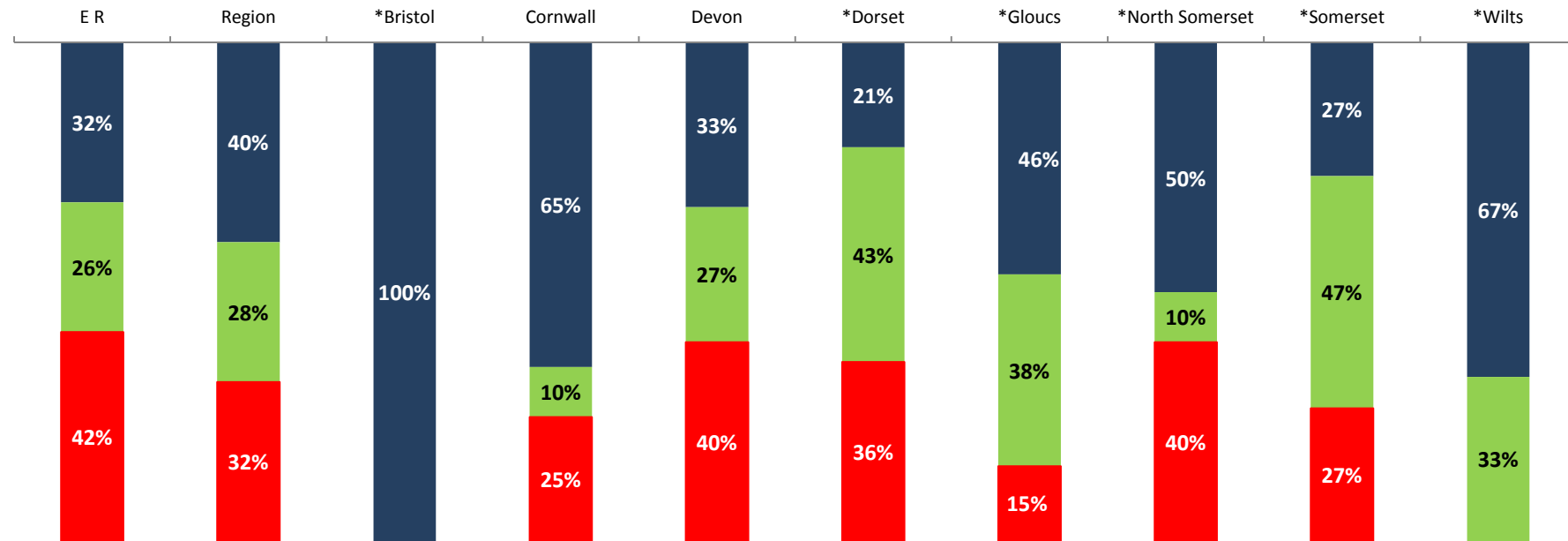
ER Self-catering (not including Holiday Parks) – Higher than the regional average in all months except January, April & July 2014.

<u>SELF-CATERING UNIT OCCUPANCY</u>	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14	Oct-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%
All SW Self-catering	16.89%	21.04%	30.19%	61.36%	39.19%	47.15%	74.57%	87.78%	55.37%	52.74%
ER Self-catering	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%	62.92%	95.94%	78.71%	55.67%
SW Self-catering	16.89%	21.04%	26.18%	46.64%	48.72%	58.10%	78.15%	85.37%	56.80%	52.38%
ER Holiday Park	*	*	*	*	*	*	*	*	*	*
SW Holiday Park	*	*	32.47%	66.33%	28.41%	*	56.51%	*	*	*

* Sample size less than 5

Performance – Turnover (2014-2013)

58% of English Riviera businesses reported increased (32%) or level turnover (26%) during October 2014 compared with October 2013, again a lower proportion when compared with the region as a whole during the same period (68%). 42% of English Riviera businesses reported decreased turnover during October 2014 (32% regionally).



* Sample less than 20

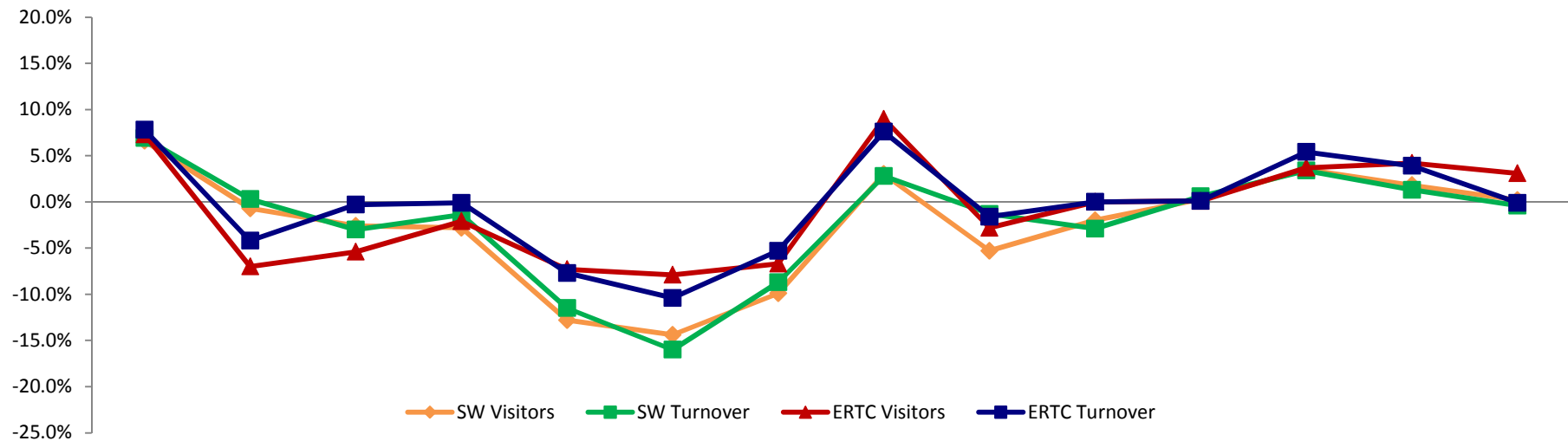
■ Increased ■ Stayed the same ■ Decreased

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Increased	32%	40%	-	-	100%	65%	33%	21%	46%	50%	27%	67%
Stayed the same	26%	28%	-	-	-	10%	27%	43%	38%	10%	47%	33%
Decreased	42%	32%	-	-	-	25%	40%	36%	15%	40%	27%	-
Base	50	139	-	-	<5	20	63	14	13	10	15	<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 October 2014 English Riviera businesses reported an increase of 3.1% in terms of visitors along with a decrease in turnover of -0.1% compared with October 2013 and compared with +0.2% and -0.4% in terms of visitors and turnover respectively during the same period for the region as a whole.

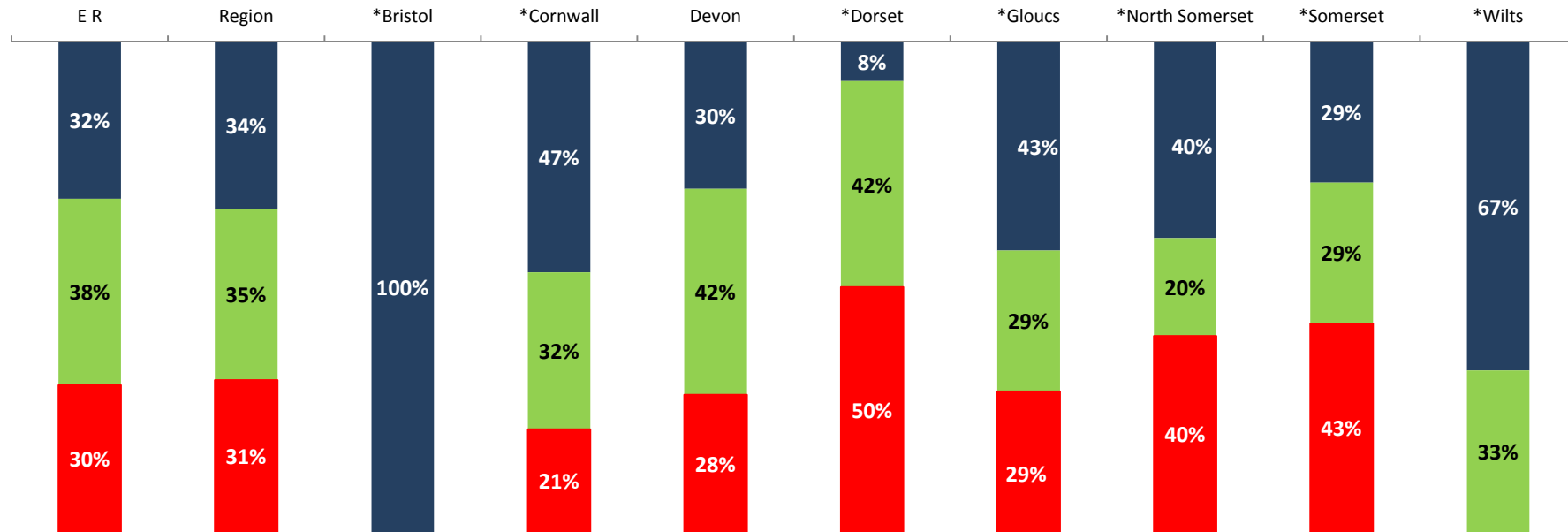
ERTC	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14
Visitors	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%	9.0%	-2.8%	0.0%	0.1%	3.7%	4.2%	3.1%
Turnover	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%	7.6%	-1.6%	0.0%	0.1%	5.4%	3.9%	-0.1%



Region	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14
Visitors	-0.7%	-2.6%	-2.8%	-12.8%	-14.4%	-9.9%	3.0%	-5.3%	-2.0%	0.3%	3.5%	1.8%	0.2%
Turnover	0.3%	-3.0%	-1.4%	-11.5%	-16.0%	-8.7%	2.8%	-1.3%	-2.9%	0.6%	3.4%	1.3%	-0.4%

Performance – Profitability (2014-2013)

70% of all English Riviera businesses reported increased (32%) or level profitability (38%) for the month, a similar proportion to the SW region as a whole during the same period (69%). 30% of businesses reported their profitability as being lower than during October 2013 (31% 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	32%	34%	-	-	100%	47%	30%	8%	43%	40%	29%	67%
Stayed the same	38%	35%	-	-	-	32%	42%	42%	29%	20%	29%	33%
Decreased	30%	31%	-	-	-	21%	28%	50%	29%	40%	43%	-
Base	47	133	-	-	<5	19	60	12	14	10	14	<5

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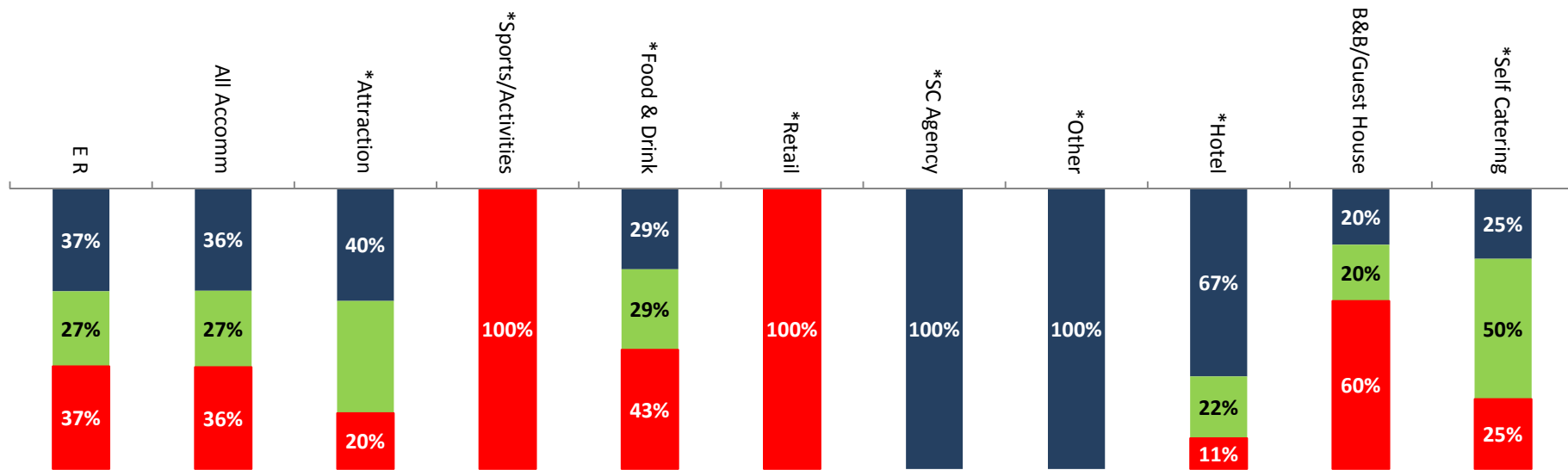
Business Type Performance

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Business Type Performance – Visitor numbers (2014-2013)

63% of all accommodation providers reported increased (36%) or level (27%) visitor numbers for October 2014. 60% of B&B/Guest Houses reported decreased visitor numbers for October 2014 compared with the same time last year whilst 40% reported increased or level visitor numbers.



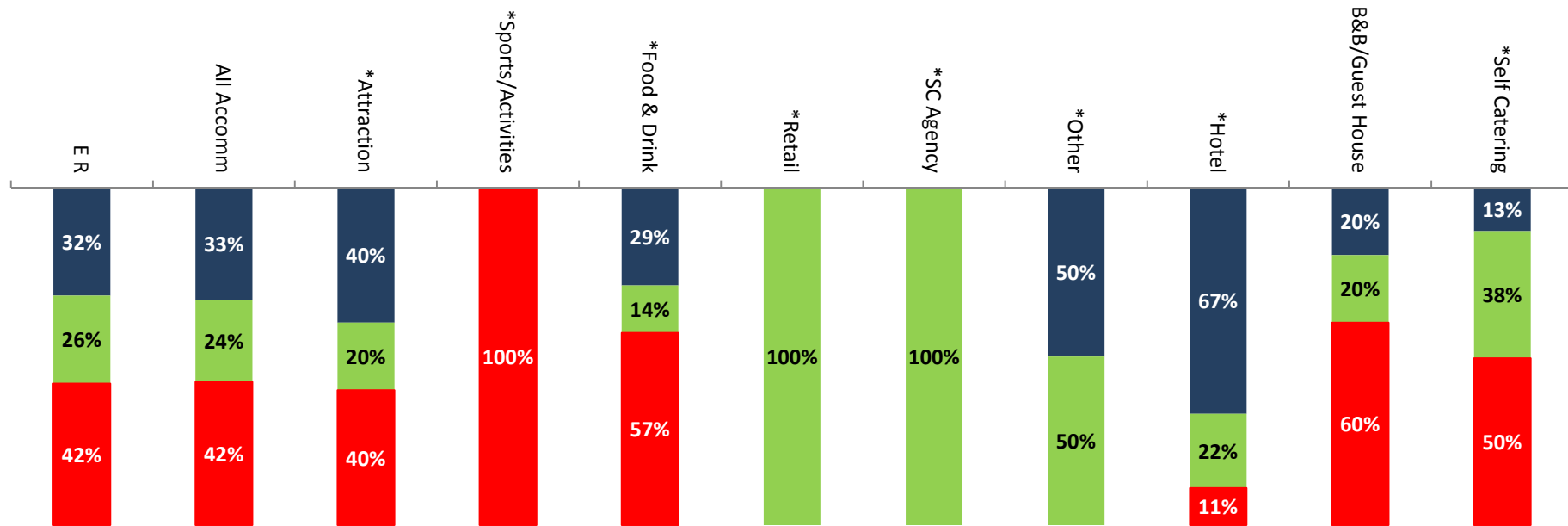
* Sample less than 10

■ 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	37%	36%	40%	-	29%	-	-	100%	100%	67%	20%	25%	-	-
Stayed the same	27%	27%	40%	-	29%	-	-	-	-	22%	20%	50%	-	-
Decreased	37%	36%	20%	100%	43%	100%	-	-	-	11%	60%	25%	-	-
Base	49	33	5	<5	7	<5	-	<5	<5	9	15	8	-	-

Business Type Performance – Turnover (2014-2013)

57% of all accommodation providers reported increased (33%) or level turnover (24%) for October 2014. 60% of B&B/Guest Houses reported decreased turnover for October 2014 compared with the same time last year whilst 40% reported increased or level turnover.



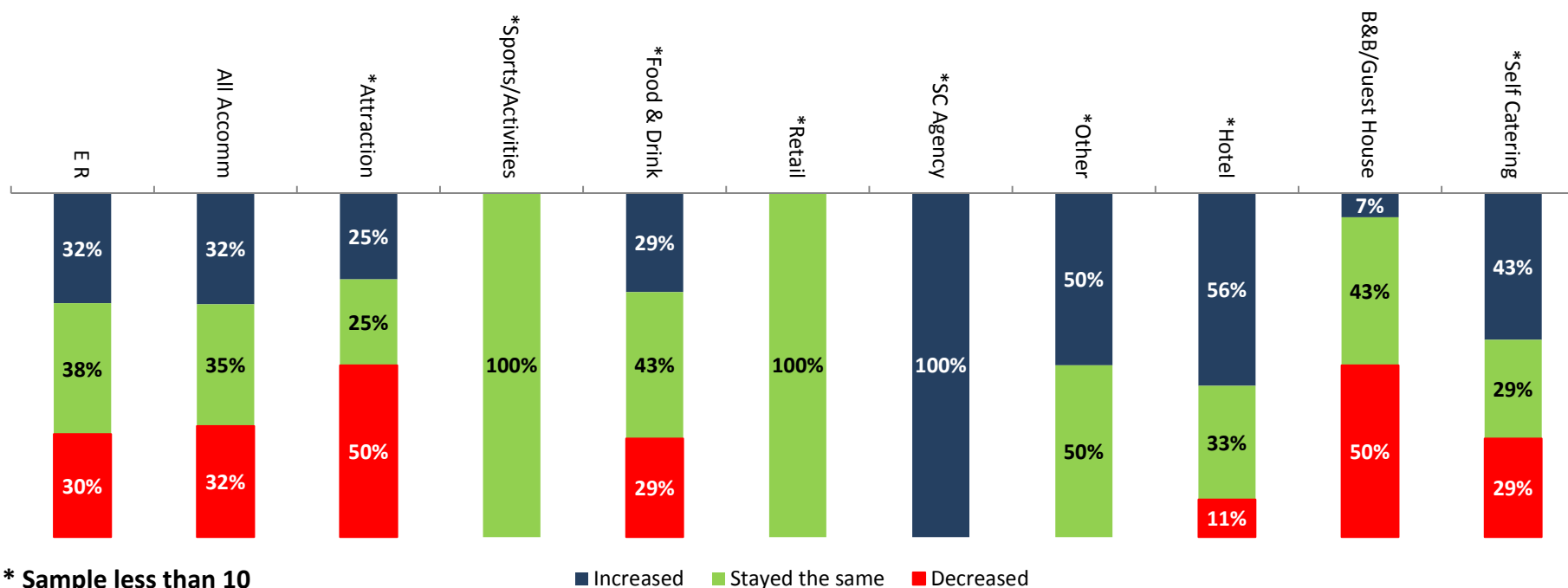
* Sample less than 10

■ 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	32%	33%	40%	-	29%	-	-	-	50%	67%	20%	13%	-	-
Stayed the same	26%	24%	20%	-	14%	100%	-	100%	50%	22%	20%	38%	-	-
Decreased	42%	42%	40%	100%	57%	-	-	-	-	11%	60%	50%	-	-
Base	50	33	5	<5	7	<5	-	<5	<5	9	15	8	-	-

Business Type Performance – Profitability (2014-2013)

67% of all accommodation providers reported increased (32%) or level (35%) profitability for October 2014. 50% of B&B/Guest Houses reported increased or level profitability for October 2014 compared with the same time last year whilst the other 50% reported decreased profitability.



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%	32%	25%	-	29%	-	-	100%	50%	56%	7%	43%	-	-
Stayed the same	38%	35%	25%	100%	43%	100%	-	-	50%	33%	43%	29%	-	-
Decreased	30%	32%	50%	-	29%	-	-	-	-	11%	50%	29%	-	-
Base	47	31	<5	<5	7	<5	-	<5	<5	9	14	7	-	-

English Riviera Tourism Monitor

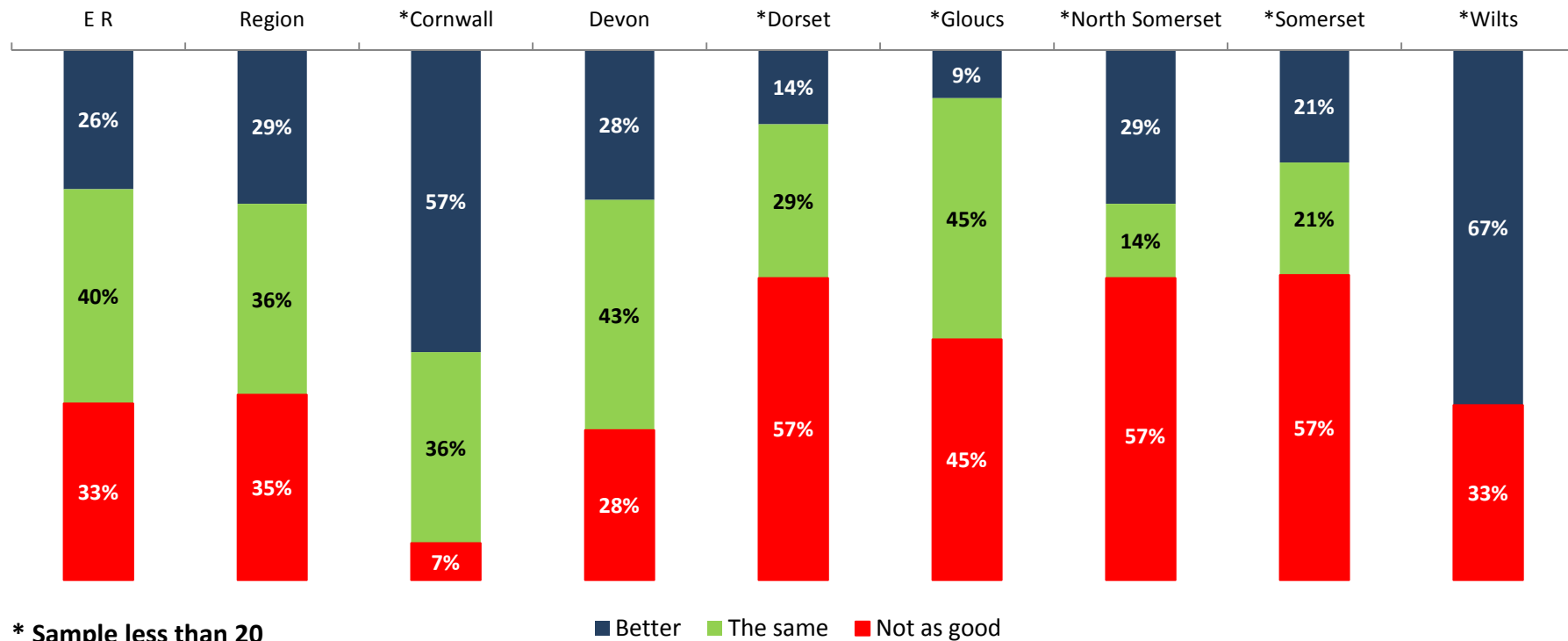
October 2014

Looking Ahead



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

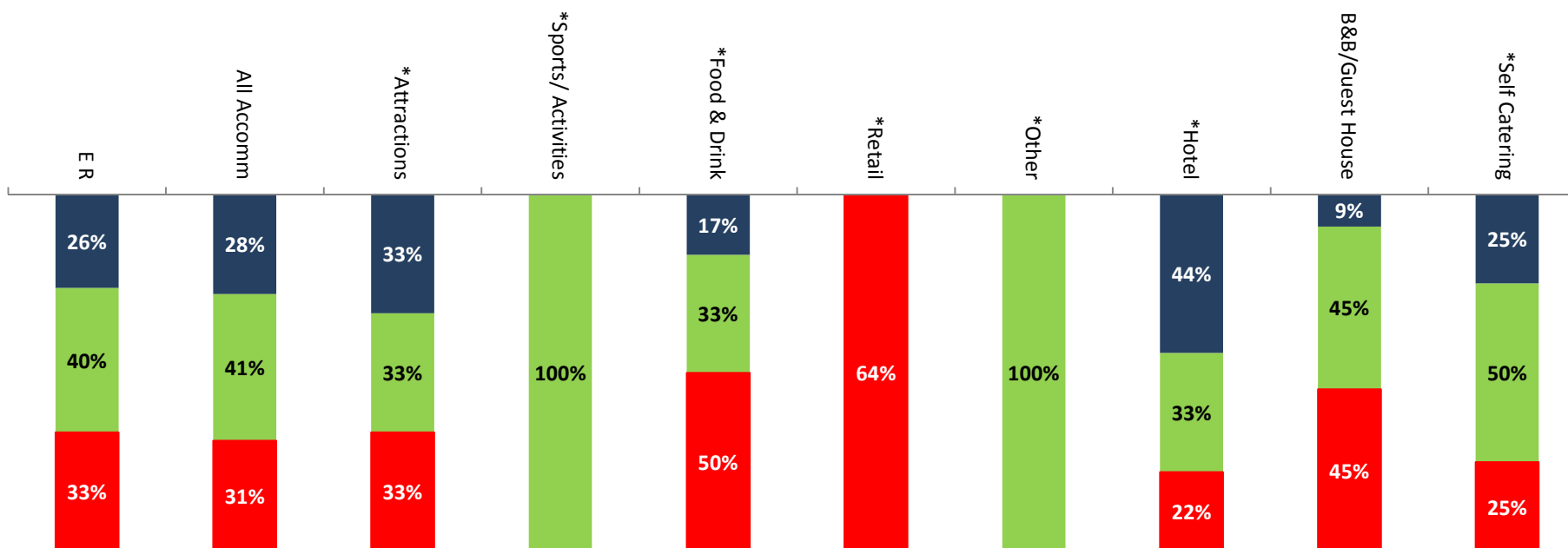
66% of English Riviera businesses reported that their booking levels for November 2014 were looking better than (26%) or the same as (40%) November 2013, compared with 65% of businesses within the region as a whole and 71% of businesses in Devon.



Booking levels	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Better	26%	29%	-	-	-	57%	28%	14%	9%	29%	21%	67%
The same	40%	36%	-	-	-	36%	43%	29%	45%	14%	21%	-
Not as good	33%	35%	-	-	-	7%	28%	57%	45%	57%	57%	33%
Base	42	109	-	-	-	14	53	7	11	7	14	<5

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

69% of all accommodation providers reported that their November 2014 booking levels were looking better than (28%) or the same as (41%) last year. 54% of B&B/Guest Houses reported that their booking levels for November 2014 were looking better than or the same as November 2013, whilst 45% said they were lower.



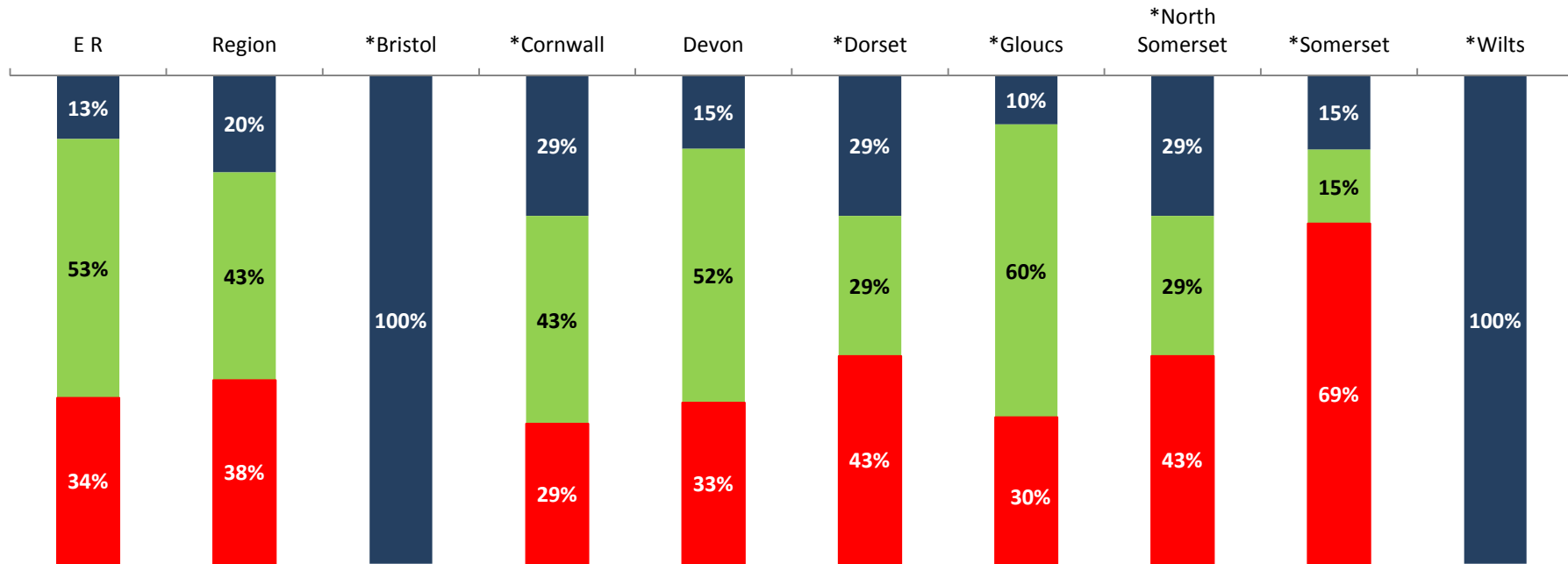
* Sample less than 10

■ 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	*Other
Better	26%	28%	33%	-	17%	-	-	100%	44%	9%	25%	-	-	-
Same	40%	41%	33%	100%	33%	-	-	-	33%	45%	50%	-	-	-
Not as good	33%	31%	33%	-	50%	100%	-	-	22%	45%	25%	-	-	-
Base	42	29	<5	<5	6	<5	-	<5	9	11	8	-	-	-

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

66% of English Riviera businesses reported that their booking levels for December 2014 were looking better than (13%) or the same as (53%) December 2013, compared with 63% of businesses within the region as a whole and 67% of businesses in Devon. 34% of businesses reported that their December booking levels were looking worse than in 2013 compared with 38% of businesses in the region as a whole and 33% in Devon.



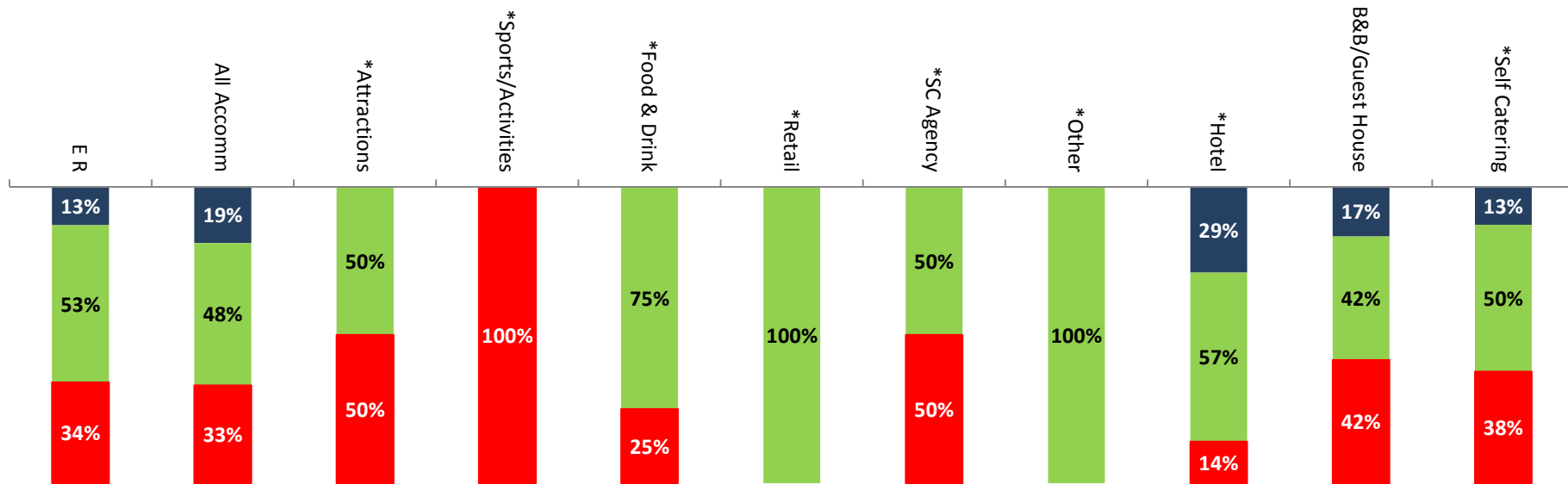
* Sample less than 20

■ Better ■ The same ■ Not as good

Booking levels	ER	Region	*Bath	*B&P	*Bristol	*Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Better	13%	20%	-	-	100%	29%	15%	29%	10%	29%	15%	100%
The same	53%	43%	-	-	-	43%	52%	29%	60%	29%	15%	-
Not as good	34%	38%	-	-	-	29%	33%	43%	30%	43%	69%	-
Base	38	101	-	-	<5	14	48	7	10	7	13	<5

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

67% of all accommodation providers reported that their December 2014 booking levels were looking better than (19%) or the same as 2013 (48%) whilst 33% said that they were looking worse than 2013. 58% of B&B/Guest Houses reported that their booking levels were looking better than or the same as December 2013, whilst 42% said they were looking worse.



* 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	*Other
Better	13%	19%	-	-	-	-	-	-	29%	17%	13%	-	-	-
Same	53%	48%	50%	-	75%	100%	50%	100%	57%	42%	50%	-	-	-
Not as good	34%	33%	50%	100%	25%	-	50%	-	14%	42%	38%	-	-	-
Base	38	27	<5	<5	<5	<5	<5	<5	7	12	8	-	-	-

English Riviera Tourism Monitor

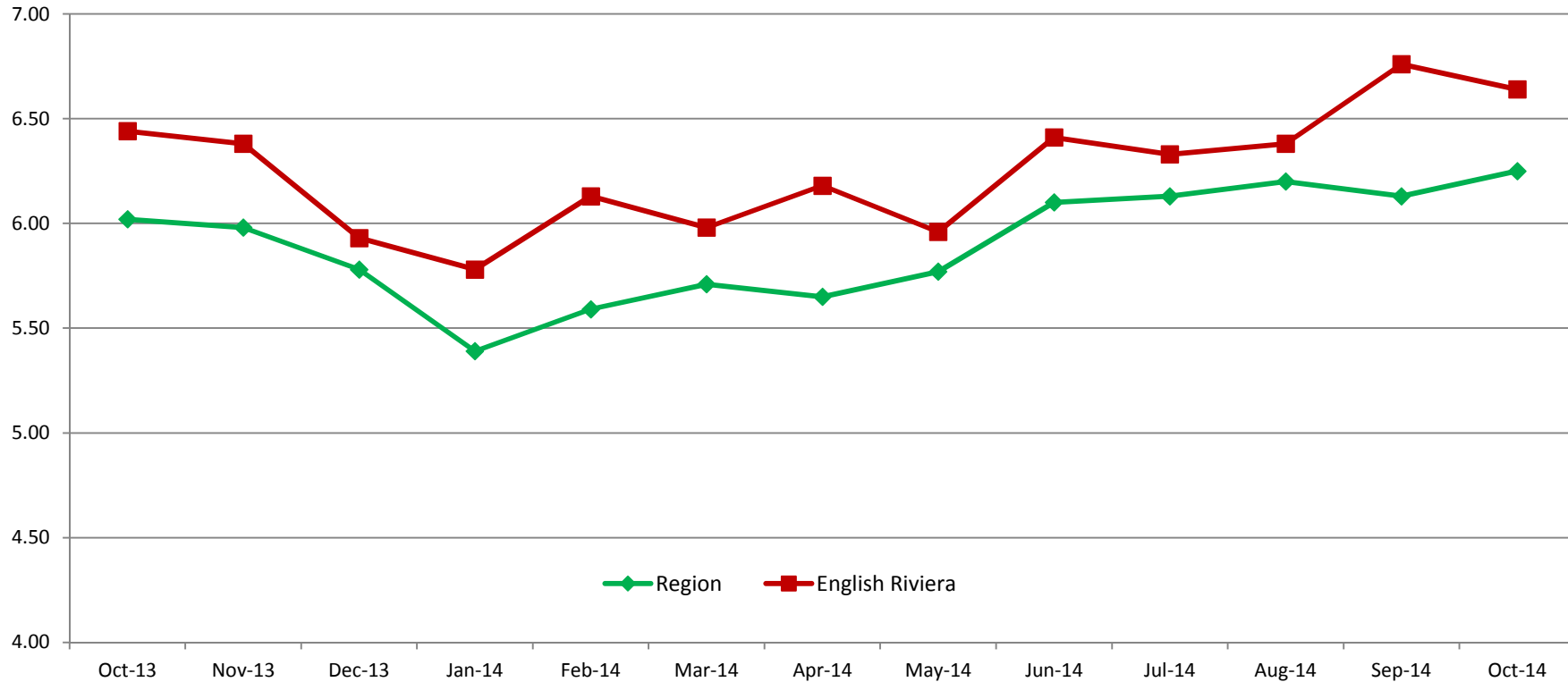
October 2014

Business Optimism



Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.64 for October 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 (6.76) but nonetheless the second highest optimism score recorded over the last 12 months. It also compares favourably with the South West regional score for October 2014 of 6.25.



Optimism	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14	Oct-14
English Riviera	6.44	6.38	5.93	5.78	6.13	5.98	6.18	5.96	6.41	6.33	6.38	6.76	6.64
Region	6.02	5.98	5.78	5.39	5.59	5.71	5.65	5.77	6.10	6.13	6.20	6.13	6.25

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 33% 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.

Fines for out of term time holidays have decreased visitor numbers in the 2 weeks running up to and after the main school summer holidays.

The situation has improved but without major investment in destination marketing for South Devon numbers will continue to fall.

With children not being allowed out on holidays in term time, effecting level of business and therefore make up of guests

With an economic recovery still very patchy and a "feel good" factor not necessarily significant among the demographic who visit the area, there are still reasons to be concerned about the prospects for 2015. Therefore good pro-active marketing is more important than ever.

Footfall still reduced by Council's needless, and demonstrably unjustified, changes to parking bay availability.

Footfall has the direct impact and therefore there are a number things that the BID could do to help bring that up. I acknowledge that there are efforts in this direction but they are sporadic and not co-ordinated. Unfortunately I do not have the time to get involved, but have commented regularly.

I think that the stripping of funds from the ERTC means that it will not be able to develop services during 2015 and this is likely to harm promotion of the Bay. Inevitably a huge amount of time and effort will be spent on the BID and this will again dilute what the ERTC is able to do. I think the economic outlook also remains weak and we are being squeezed ever more for deals and discounts.

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

