ENGLISH RIVIERA TOURISM COMPANY
WORKING IN PARTNERSHIP

English Riviera Tourism Monitor

September 2014

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

The South West Research Company

November 2014

Executive Summary

Compared to September 2013 businesses reported that:

<u>September 2014 Visitor levels:</u>

Increased 50% / Stayed the same 19% / Decreased 31%

Estimated actual change in visitors +4.2%

<u>September 2014 Turnover levels:</u>

Increased 48% / Stayed the same 20% / Decreased 31%

Estimated actual change in turnover +3.9%

<u>September 2014 Profitability was:</u>

Higher 36% / Stayed the same 32% / Decreased 32%

<u>October 2014 Outlook is:</u>

Better 18% / Same as last year 41% / Not as good 41%

<u>November 2014 Outlook is:</u>

Better 13% / Same as last year 45% / Not as good 42%

<u>Optimism</u>

Optimism score is 6.76 out of a possible 10

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Introduction

Background & Rationale

The ERTC has committed to undertake a range of research projects on the English Riviera to enable it to monitor its performance in delivering the new tourism strategy as well as the performance of the tourism industry in the area in general.

This monthly tourism monitor is part of that process. Each month, an online survey is distributed to ERTC Promotional Partners and other English Riviera businesses asking about business levels in the previous month to enable the ERTC to monitor business performance.

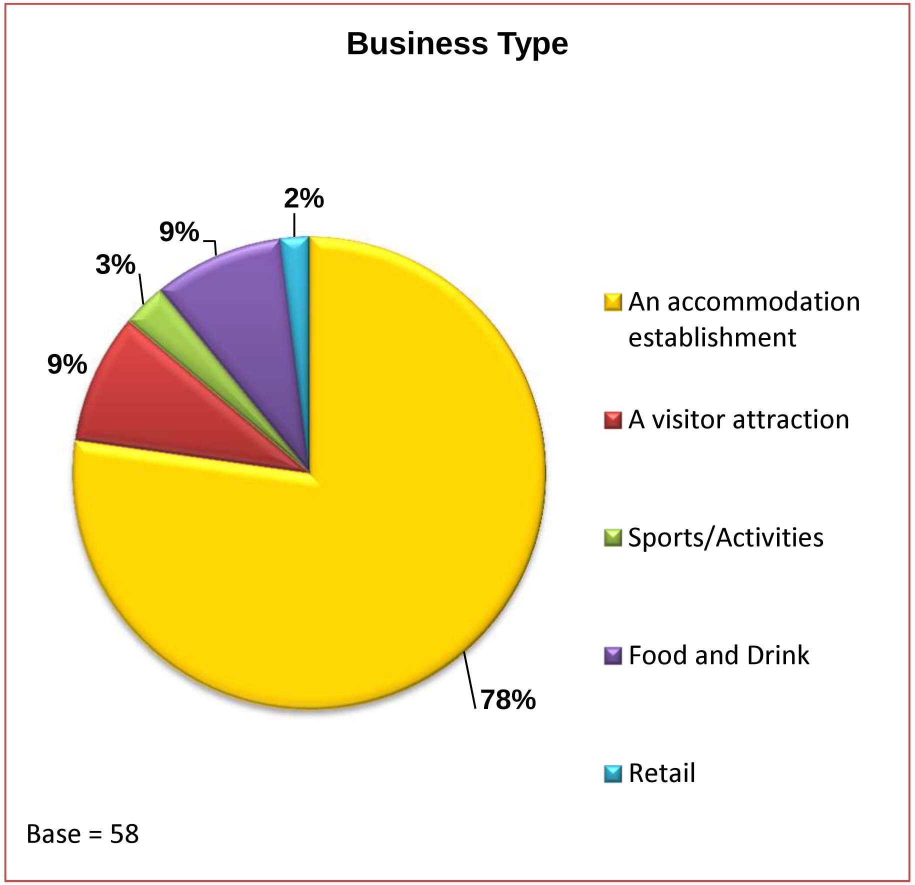
Wherever possible, this report will provide comparisons against regional data to enable the ERTC to benchmark its performance.

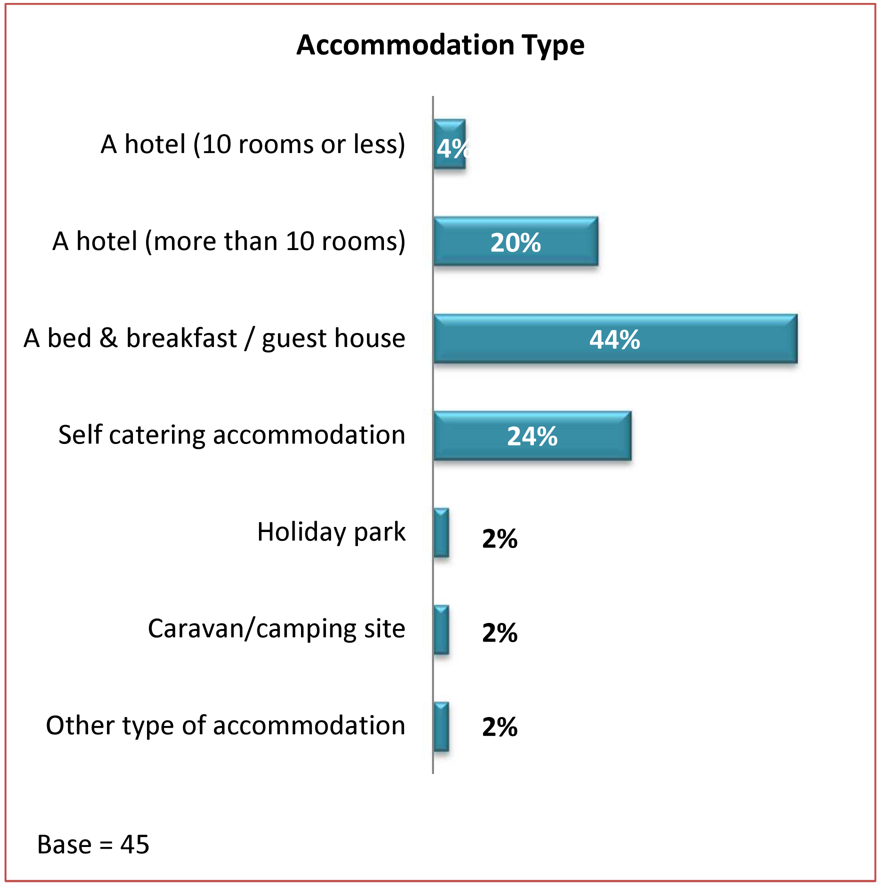
English Riviera Tourism Monitor

September 2014

Sample Profile

Business Type

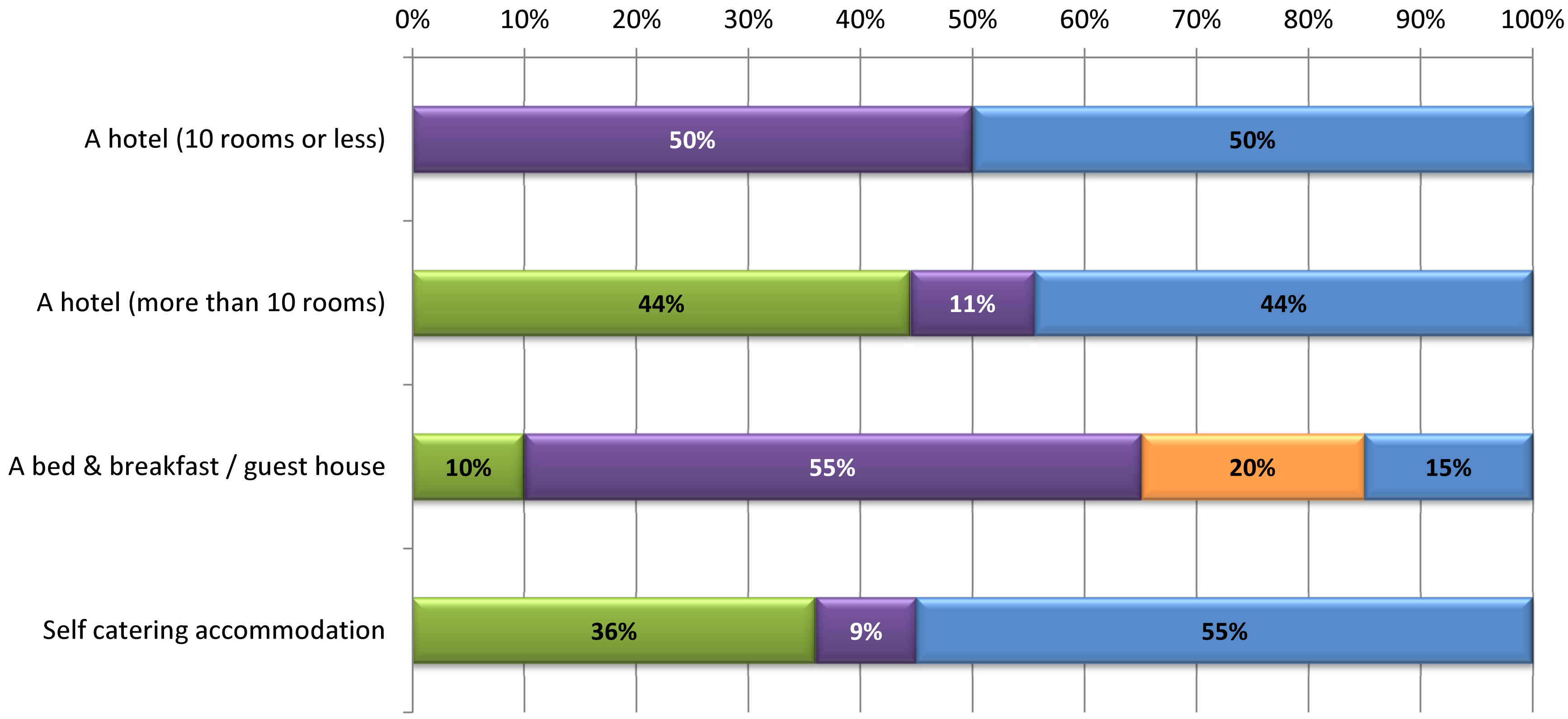




Accommodation providers accounted for 78% of responses with Food & Drink establishments and Visitor Attractions accounting for 9% each.

Serviced accommodation providers accounted for 68% of accommodation responses and Self catering accommodation a further 24%.

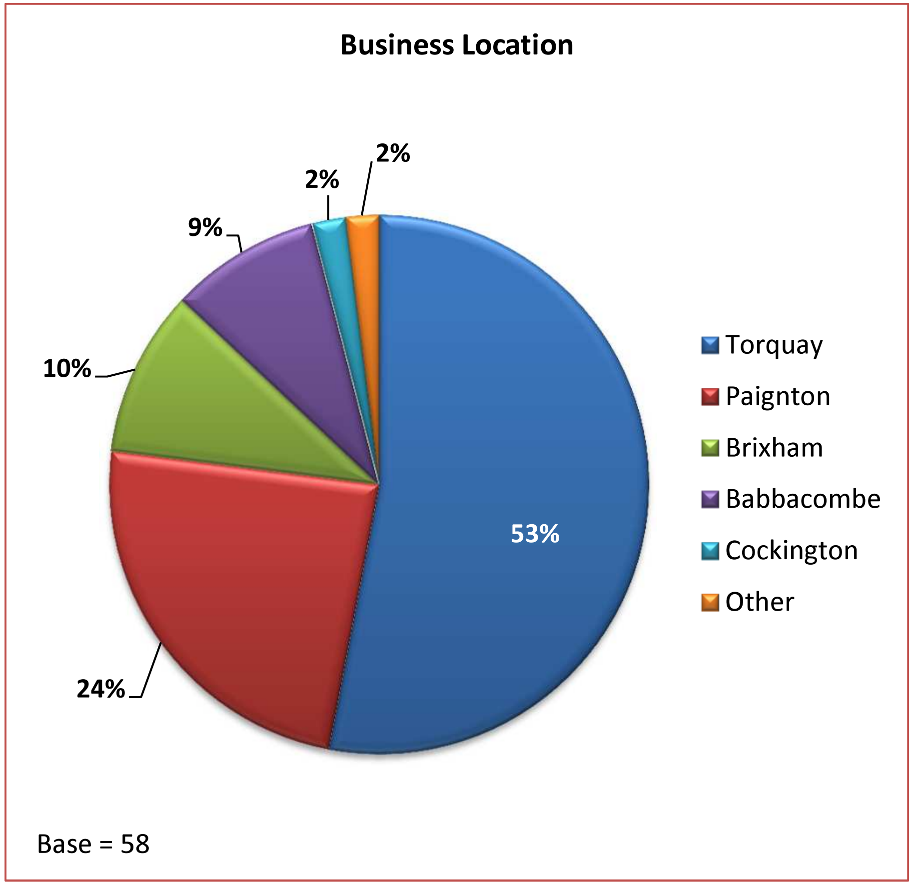
Accommodation Type and Rating

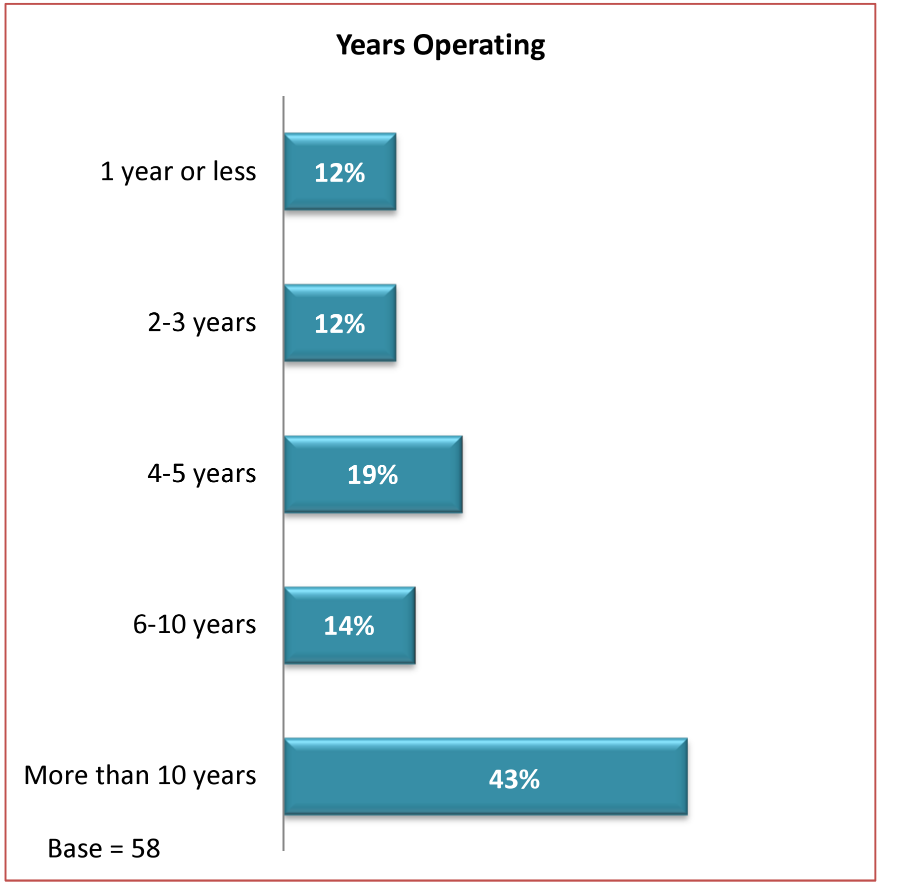


Base = 45

55% of Self catering operators, 50% of hotels with 10 rooms or less and 44% 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 53% of responses with 24% from Paignton. A further 10% of businesses were from Brixham, 9% from Babbacombe and 2% from Cockington. A further 2% of businesses were based elsewhere in the resort.

57% of businesses have been operating for more than 6 years.

English Riviera Tourism Monitor

September 2014

The Month in Context

September 2014 – The Month in Context

The UK Weather

September was dominated by high pressure, bringing plenty of fine and settled early-autumn weather, with only a few short interruptions. This meant that rainfall was limited in most regions and temperatures were generally above average, though with no exceptional warmth on any particular days.

The provisional UK mean temperature was 13.9 °C, 1.3 °C above the 1981-2010 long-term average. This made it the equal-fourth warmest September for the UK in a series since 1910, although not as warm as 2006. It was also only the fifth time that the UK mean temperature for September has equalled or exceeded that for August. Rainfall was well below average in most places, with less than 20% of the long-term average over large swathes of the country and an overall UK figure of just 23% of average. This was provisionally the driest September in a series since 1910, though only slightly drier than 1959. It was also the driest calendar month for the UK since August 1995. Sunshine was very close to normal overall, though it was sunnier relative to average on the western side than further east.

Weather impacts

The month was mostly fine and settled with few weather-related impacts. The north-east corner of Scotland saw some heavy rain on the 7th. On the morning of 19th, there was some localised heavy rainfall with thundery activity over southern parts of England causing problems on the roads; this continued until the 20th in parts of the south-east. Some areas had thick fog on the mornings of 23rd, 29th and 30th, again mainly in the south, causing minor problems for motorists.

Source: Met Office

September 2014 – The Month in Context

The UK Economy

UK economic growth has been revised up to 0.9% for the second quarter of the year by the Office for National Statistics (ONS), compared with a previous estimate of 0.8%. UK GDP was 3.2% higher in the second quarter compared with a year earlier.

Revised ONS figures also show the UK economy surpassed its pre-recession peak in the third quarter of 2013. Previously, this was thought to have been achieved in the second quarter of 2014. The figures from the ONS include a new methodology for calculating gross domestic product (GDP). The ONS now estimates that GDP was 2.7% higher than its pre-crisis peak by the end of the second quarter this year. However, the ONS also revised its estimate of growth in the first quarter of the year down to 0.7% from an earlier estimate of 0.8%.

Growth in the second quarter of the year was boosted by a 1.1% rise in output from the services industry. The contribution from construction was revised up sharply to show 0.7% growth compared with a previous estimate of zero growth. The Bank of England forecasts that the UK's economy will grow by 3.5% in 2014, and the ONS figures show the business confidence is continuing to strengthen.

But despite economic growth, the current account deficit widened from 4.7% of GDP in the first quarter of 2014 to 5.2% in the second quarter. David Kern, chief economist at the British Chambers of Commerce (BCC), said the deficit was at "a level which in the long-term will prove to be unsustainable". And under the ONS's new methodology, public sector debt as a percentage of GDP, excluding banks, now stands at 79.1% compared with 76.5% using the old system.

Howard Archer, chief UK and European economist at IHS Global Insight, said: "While a smaller than previously reported recession in 2008-09 and better than previously reported GDP growth since then is welcome news, it does not hugely change the growth outlook - especially as there have been no major revisions to the economy's performance in 2013 and the first half of 2014. What it does imply though is that the UK's recent productivity performance has not been as bad as thought and that the economy has greater capacity to grow without generating inflationary pressures."

Source: The BBC

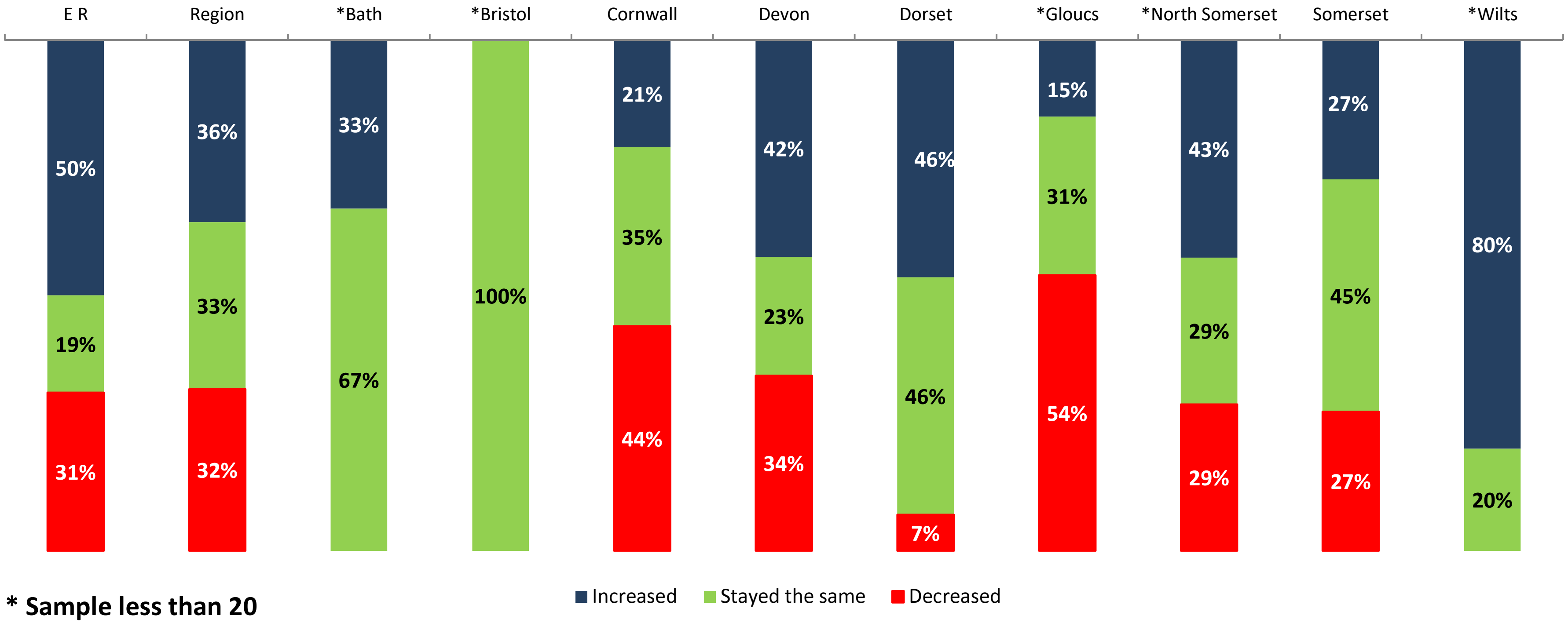
English Riviera Tourism Monitor

September 2014

Performance

Performance – Visitor Numbers (2014-2013)

50% of English Riviera businesses reported that their visitor numbers had increased compared with September 2013 – a significantly higher proportion when compared against the region as a whole during the same period (36%). 31% of businesses indicated that their visitor numbers had decreased compared with the same time last year (32% regionally).



*** Sample less than 20**

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	50%	36%	33%	-	-	21%	42%	46%	15%	43%	27%	80%
Stayed the same	19%	33%	67%	-	100%	35%	23%	46%	31%	29%	45%	20%
Decreased	31%	32%	-	-	-	44%	34%	7%	54%	29%	27%	-
Base	58	206	<5	-	<5	34	90	28	13	7	22	5

Performance – Estimated occupancy levels September 2014

The slides to follow show the estimated occupancy for September 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

September-14	% RM OCCUPANCY	SAMPLE
English Riviera	81.14%	30
All hotels	84.53%	9
Hotel 10 rooms or less	54.10%	2
Hotel more than 10 rooms	84.53%	9
B&B	60.33%	10
Guest House	68.49%	9
Torquay	81.33%	18
Paignton	81.88%	7
Brixham	88.44%	<5
Babbacombe	52.50%	<5
**Cockington	0.00%	0
Other English Riviera	78.89%	<5
Devon	80.25%	44
South West	75.79%	78

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

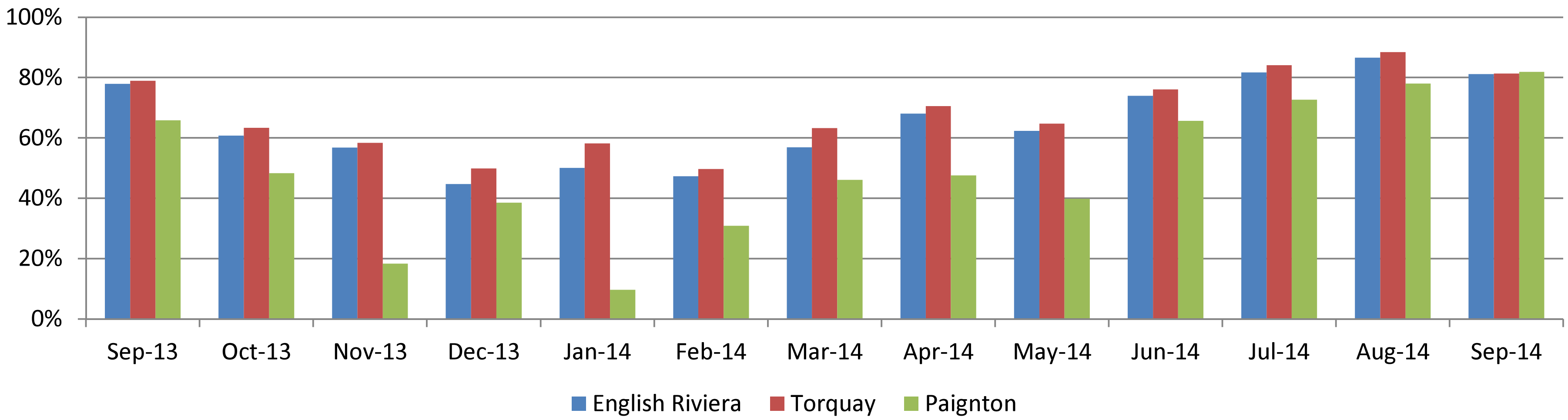
English Riviera serviced room occupancy was calculated at 81.14% for September 2014 compared with an average of 75.79% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for September 2014 was calculated at 78.71% compared with 55.37% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY

September-14	% UNIT OCC	SAMPLE
English Riviera	78.71%	10
Self-catering accommodation	78.71%	10
Holiday Park	0.00%	0
Torquay	87.14%	<5
Paignton	75.63%	6
Brixham	0.00%	<5
Babbacombe	0.00%	0
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	67.21%	22
South West	55.37%	60

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



SERVICED ROOM OCCUPANCY	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	Jul-14	Aug-14	Sept-14
English Riviera	77.96%	60.75%	56.83%	44.72%	50.07%	47.32%	56.90%	68.04%	62.36%	73.97%	81.71%	86.59%	81.14%
Torquay	78.96%	63.34%	58.40%	49.88%	58.22%	49.69%	63.22%	70.50%	64.72%	76.09%	84.07%	88.44%	81.33%
Paignton	65.84%	48.34%	18.32%	38.51%	9.63%	30.84%	46.09%	47.56%	39.8%	65.65%	72.63%	78.00%	81.88%
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 September 2014 English Riviera serviced occupancy was higher than all comparison areas.

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.

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14
South West	46.15%	47.12%	57.12%	63.21%	62.73%	75.60%	81.27%	82.17%	75.79%
Former Avon	*	*	*	*	*	*	*	*	*
Cornwall	*	36.61%	48.59%	50.82%	57.60%	67.16%	86.28%	89.10%	36.31%
Devon	47.35%	44.94%	54.86%	66.40%	61.49%	73.97%	80.49%	83.29%	80.25%
English Riviera	**50.07%**	**47.32%**	**56.90%**	**68.04%**	**62.36%**	**73.97%**	**81.71%**	**86.59%**	**81.14%**
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**

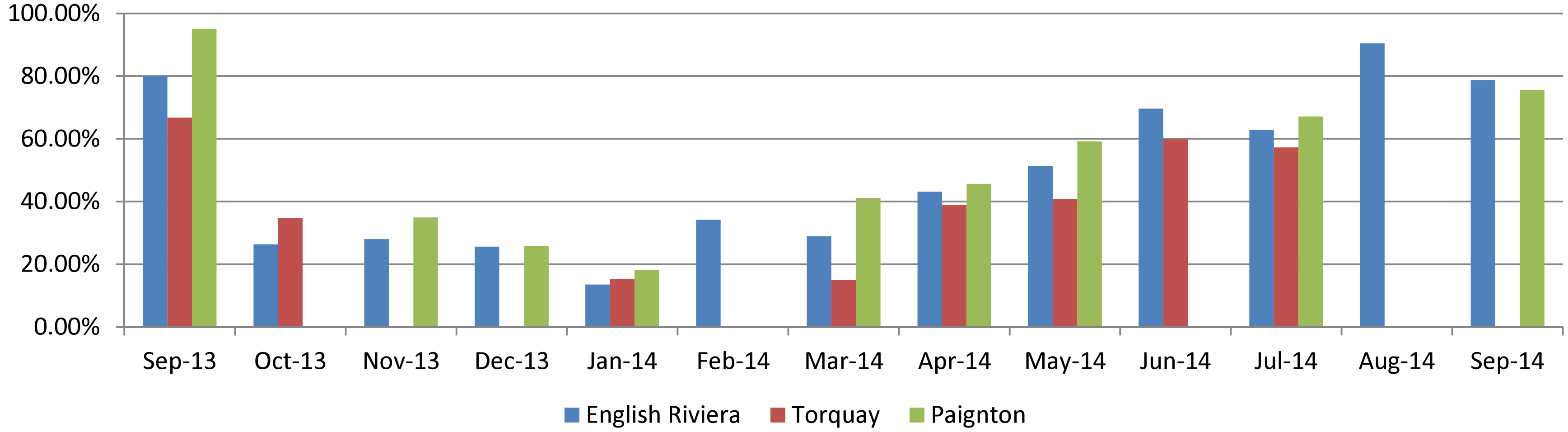
Performance – Estimated serviced accommodation occupancy levels 2014 by type

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
All ER hotels	**55.42%**	**52.05%**	**61.01%**	**71.96%**	**67.17%**	**77.30%**	**84.54%**	**88.28%**	**84.53%**
All SW hotels	50.76%	51.93%	62.15%	67.71%	67.08%	77.84%	84.07%	83.08%	77.68%
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%
ER Hotel more than 10 rooms	**57.54%**	**54.40%**	**61.01%**	**73.42%**	**68.62%**	**83.44%**	**85.26%**	**91.19%**	**84.53%**
SW Hotel more than 10 rooms	52.93%	56.10%	62.54%	69.50%	68.17%	81.33%	84.68%	83.84%	78.59%
ER B&B/Guest House	**8.34%**	**17.56%**	**20.79%**	**31.82%**	**37.21%**	**53.16%**	**69.42%**	**80.25%**	**65.06%**
SW B&B/Guest House	23.00%	26.78%	23.34%	35.27%	45.25%	65.03%	68.24%	77.99%	66.36%

*** Sample size less than 5**

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



SELF-CATERING UNIT OCCUPANCY	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14
All ER Self-catering	79.96%	26.37%	28.01%	25.64%	13.52%	34.23%	28.98%	43.17%	51.36%	69.64%	62.92%	90.48%	78.71%
Torquay	66.74%	34.79%	*	*	15.30%	*	15.00%	38.92%	40.78%	59.87%	57.30%	*	*
Paignton	95.12%	*	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 September 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, June, August & September 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.

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14
South West	16.89%	12.88%	30.19%	61.36%	39.19%	47.15%	74.57%	87.78%	55.37%
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%
English Riviera	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**	**90.48%**	**78.71%**
Dorset	19.71%	7.40%	13.98%	48.33%	63.30%	14.01%	68.96%	97.03%	71.85%
Gloucestershire	*	7.06%	*	88.79%	*	*	*	*	*
Somerset	19.23%	4.88%	17.89%	54.98%	31.82%	56.92%	54.20%	80.12%	53.62%
Wiltshire	*	0.00%	*	*	*	*	*	*	*

*** Sample size less than 5**

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

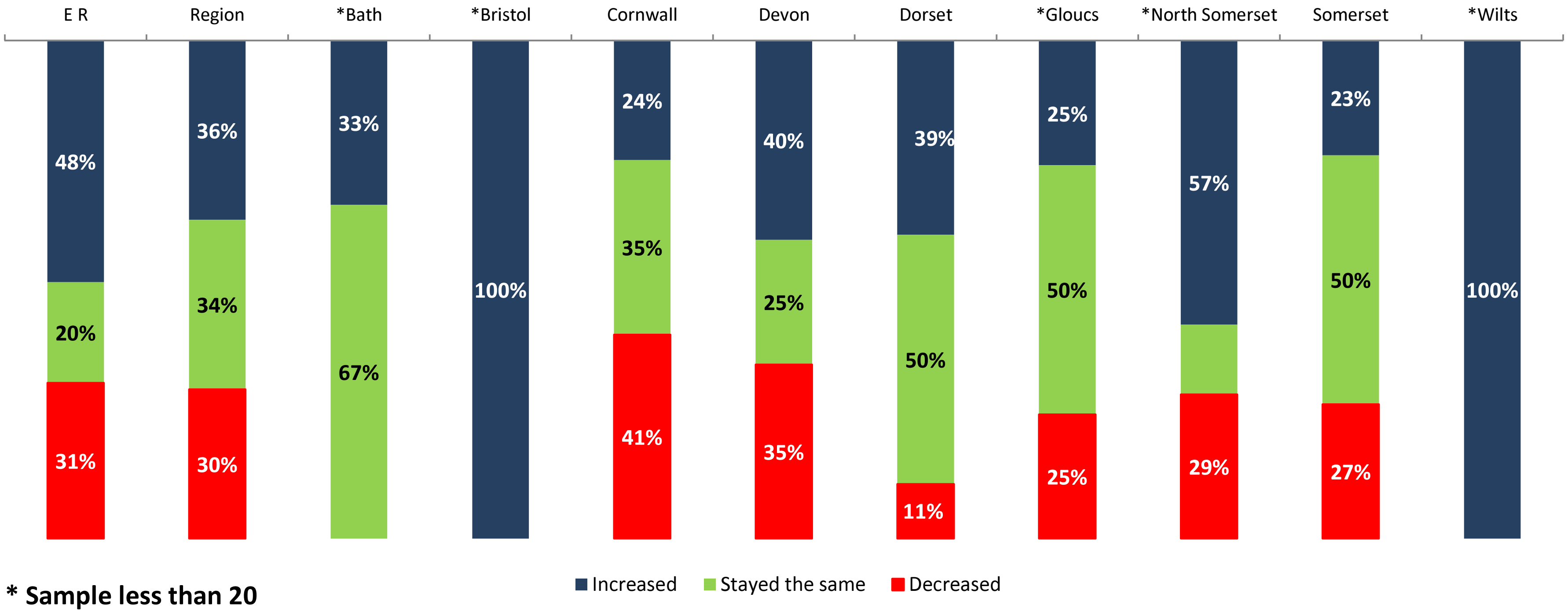
Key comparisons;
All ER Self-catering – Higher than the regional average during February, May, June, August & September 2014.
ER Self-catering (not including Holiday Parks) – Higher than the regional average in all months except January, April & July 2014.

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14	Apr-14	May-14	June-14	July-14	Aug-14	Sept-14
All ER Self-catering	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**	**90.48%**	**78.71%**
All SW Self-catering	16.89%	21.04%	30.19%	61.36%	39.19%	47.15%	74.57%	87.78%	55.37%
ER Self-catering	**13.52%**	**34.23%**	**28.98%**	**43.17%**	**51.36%**	**69.64%**	**62.92%**	**95.94%**	**78.71%**
SW Self-catering	16.89%	21.04%	26.18%	46.64%	48.72%	58.10%	78.15%	85.37%	56.80%
ER Holiday Park	*	*	*	*	*	*	*	*	*
SW Holiday Park	*	*	32.47%	66.33%	28.41%	*	56.51%	*	*

*** Sample size less than 5**

Performance – Turnover (2014-2013)

48% of English Riviera businesses reported increased turnover during September 2014 compared with September 2013, again a higher proportion when compared with the region as a whole during the same period (36%). 31% of English Riviera businesses reported decreased turnover during September 2014 (30% regionally).



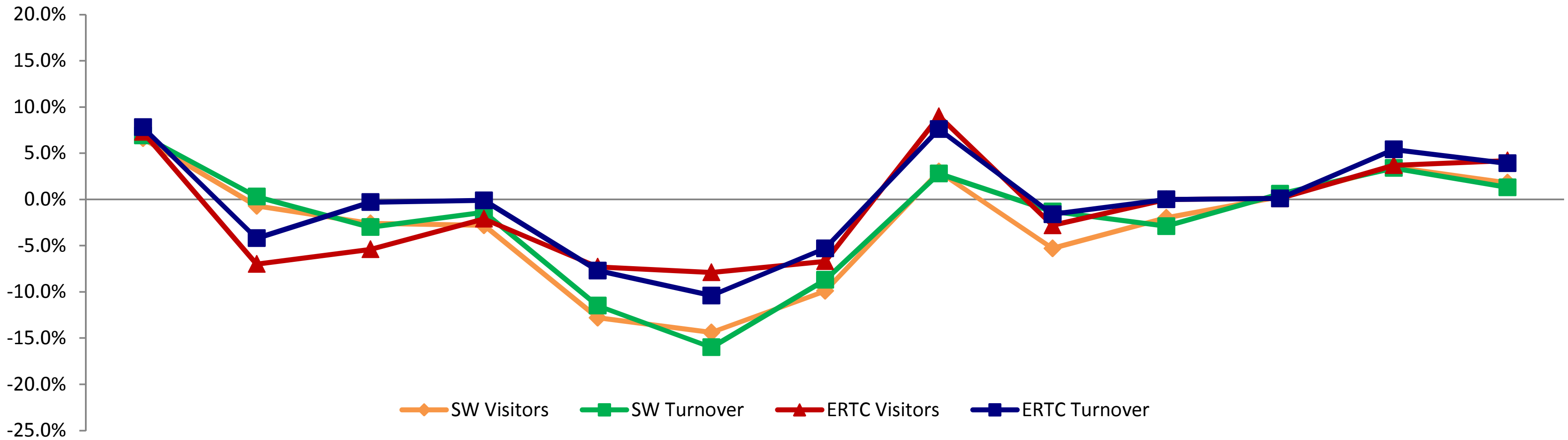
*** Sample less than 20**

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	48%	36%	33%	-	100%	24%	40%	39%	25%	57%	23%	100%
Stayed the same	20%	34%	67%	-	-	35%	25%	50%	50%	14%	50%	-
Decreased	31%	30%	-	-	-	41%	35%	11%	25%	29%	27%	-
Base	54	203	<5	-	<5	34	88	28	12	7	22	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 September 2014 English Riviera businesses reported an increase of 4.2% in terms of visitors and 3.9% in terms of turnover compared with September 2013 and compared with increases of 1.8% and 1.3% in terms of visitors and turnover during the same period for the region as a whole.

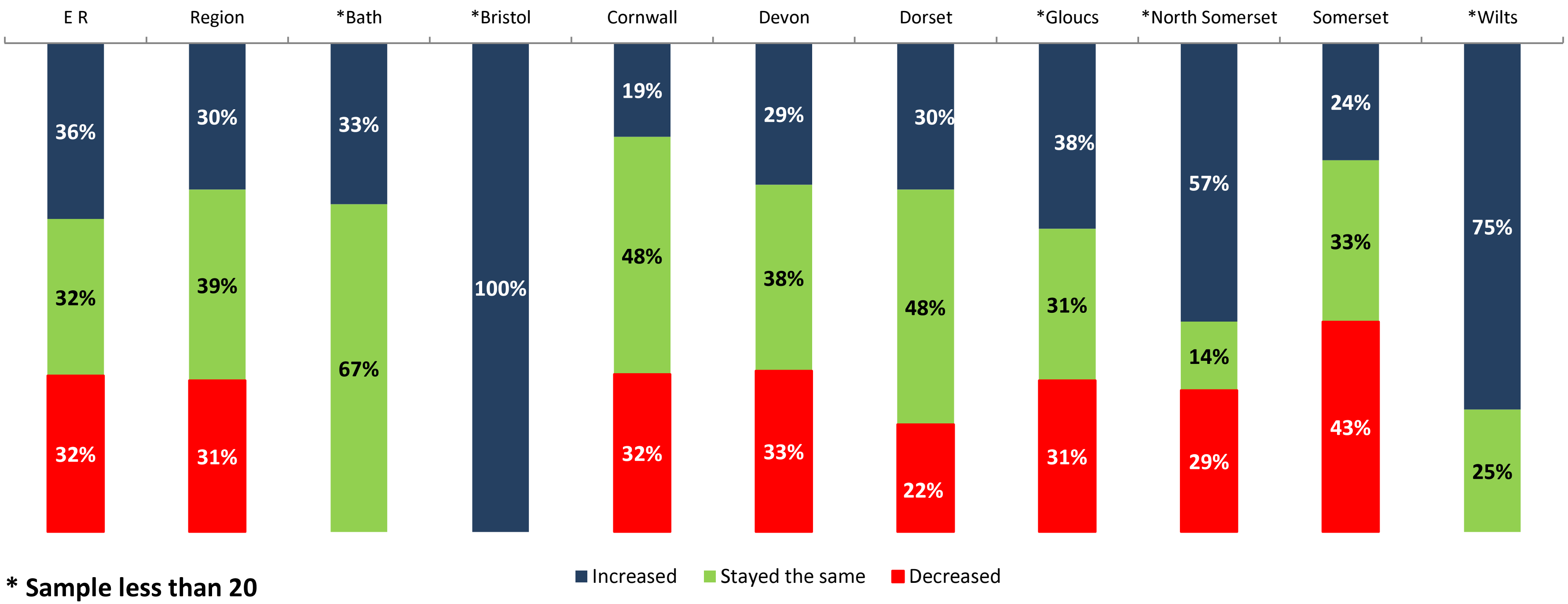
ERTC	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14
Visitors	7.3%	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%	9.0%	-2.8%	0.0%	0.1%	3.7%	4.2%
Turnover	7.8%	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%	7.6%	-1.6%	0.0%	0.1%	5.4%	3.9%



Region	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14
Visitors	6.6%	-0.7%	-2.6%	-2.8%	-12.8%	-14.4%	-9.9%	3.0%	-5.3%	-2.0%	0.3%	3.5%	1.8%
Turnover	6.9%	0.3%	-3.0%	-1.4%	-11.5%	-16.0%	-8.7%	2.8%	-1.3%	-2.9%	0.6%	3.4%	1.3%

Performance – Profitability (2014-2013)

68% of all English Riviera businesses reported increased (36%) or level profitability (32%) for the month, a similar proportion to the SW region as a whole during the same period (69%). 32% of businesses reported their profitability as being lower than during September 2013 (31% of SW businesses).



*** Sample less than 20**

Profitability	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	36%	30%	33%	-	100%	19%	29%	30%	38%	57%	24%	75%
Stayed the same	32%	39%	67%	-	-	48%	38%	48%	31%	14%	33%	25%
Decreased	32%	31%	-	-	-	32%	33%	22%	31%	29%	43%	-
Base	53	192	<5	-	<5	31	86	23	13	7	21	<5

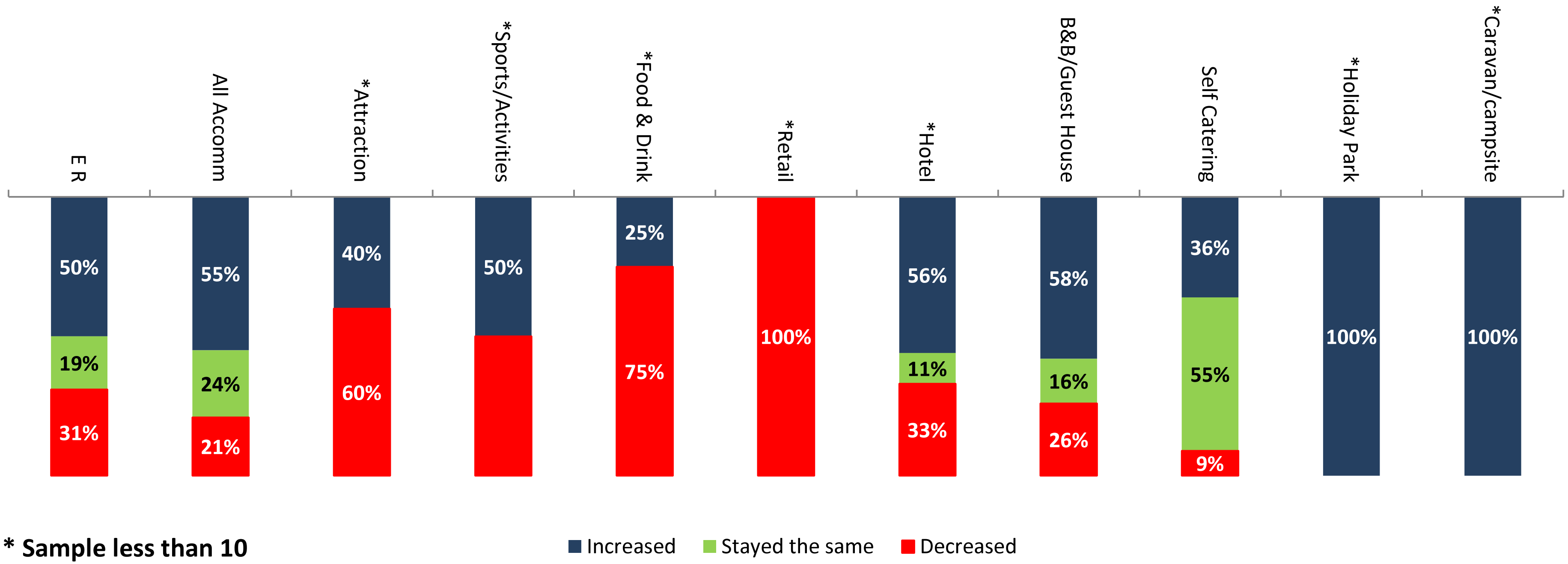
English Riviera Tourism Monitor

September 2014

Business Type Performance

Business Type Performance – Visitor numbers (2014-2013)

79% of all accommodation providers reported increased (55%) or level (24%) visitor numbers for September 2014. 91% of Self Catering operators and 74% of B&B/Guest Houses reported increased or level visitor numbers for September 2014 compared with the same time last year. 26% of B&B/Guest Houses reported decreased visitor numbers compared with the same time last year.

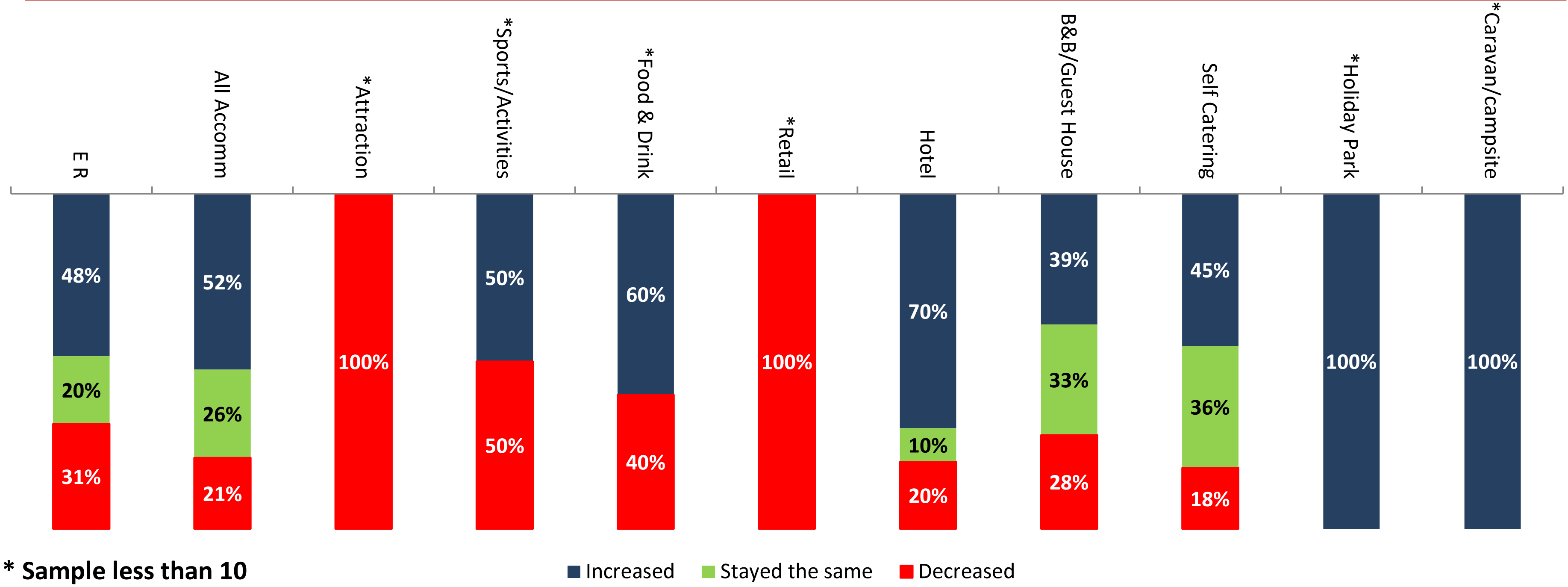


*** Sample less than 10**

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	50%	55%	40%	50%	25%	-	-	-	-	56%	58%	36%	100%	100%
Stayed the same	19%	24%	-	-	-	-	-	-	-	11%	16%	55%	-	-
Decreased	31%	21%	60%	50%	75%	100%	-	-	-	33%	26%	9%	-	-
Base	54	42	5	<5	<5	<5	-	-	-	9	19	11	<5	<5

Business Type Performance – Turnover (2014-2013)

78% of all accommodation providers reported increased (52%) or level turnover (26%) for September 2014. 80% of Hotels reported increased or level turnover for September 2014 compared with the same time last year along with 81% of Self Catering operators and 72% of B&B/Guest Houses. 28% of B&B/Guest Houses reported decreased turnover compared with the same time last year.

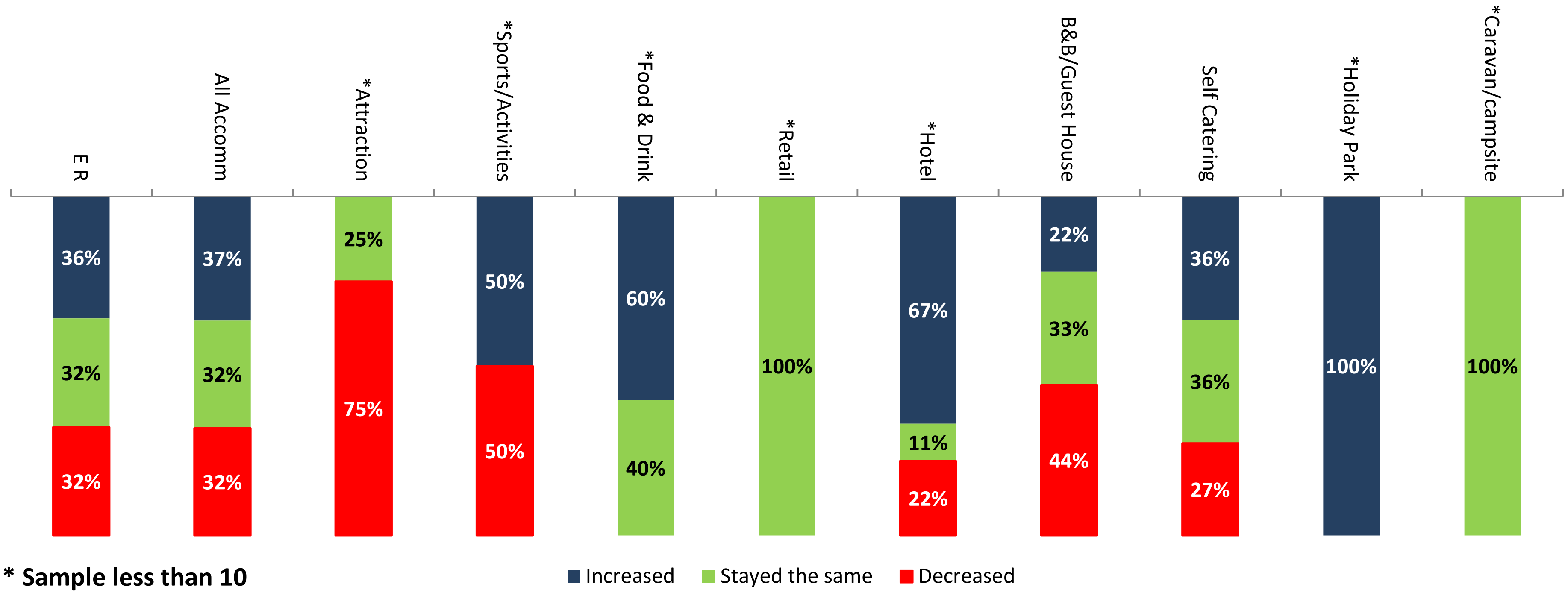


*** Sample less than 10**

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	48%	52%	-	50%	60%	-	-	-	-	70%	39%	45%	100%	100%
Stayed the same	20%	26%	-	-	-	-	-	-	-	10%	33%	36%	-	-
Decreased	31%	21%	100%	50%	40%	100%	-	-	-	20%	28%	18%	-	-
Base	54	42	<5	<5	5	<5	-	-	-	10	18	11	<5	<5

Business Type Performance – Profitability (2014-2013)

69% of all accommodation providers reported increased (37%) or level (32%) profitability for September 2014. 72% of Self Catering operators and 55% of B&B/Guest Houses reported increased or level profitability for September 2014 compared with the same time last year. 44% of B&B/Guest Houses and 27% of Self Catering operators reported decreased profitability compared with September 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	36%	37%	-	50%	60%	-	-	-	-	67%	22%	36%	100%	-
Stayed the same	32%	32%	25%	-	40%	100%	-	-	-	11%	33%	36%	-	100%
Decreased	32%	32%	75%	50%	-	-	-	-	-	22%	44%	27%	-	-
Base	53	41	<5	<5	5	<5	-	-	-	9	18	11	<5	<5

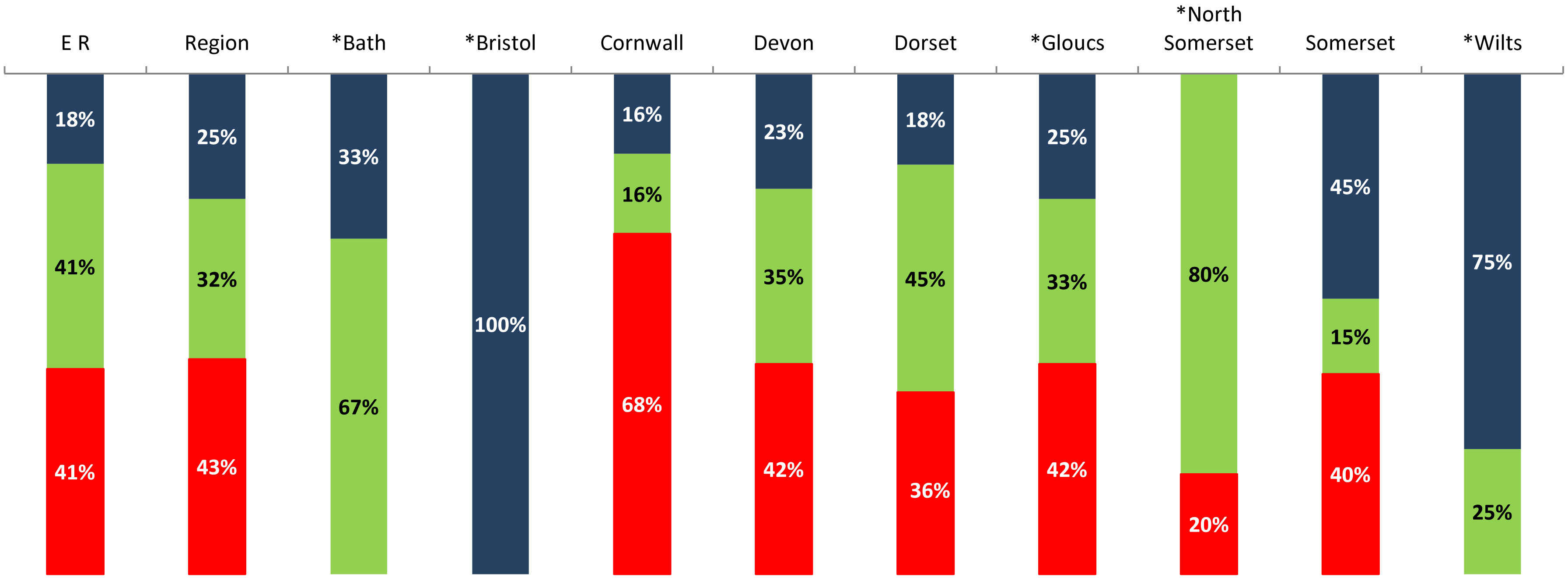
English Riviera Tourism Monitor

September 2014

Looking Ahead

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

59% of English Riviera businesses reported that their booking levels for October 2014 were looking better than (18%) or the same as (41%) October 2013, compared with 57% of businesses within the region as a whole and 58% of businesses in Devon.

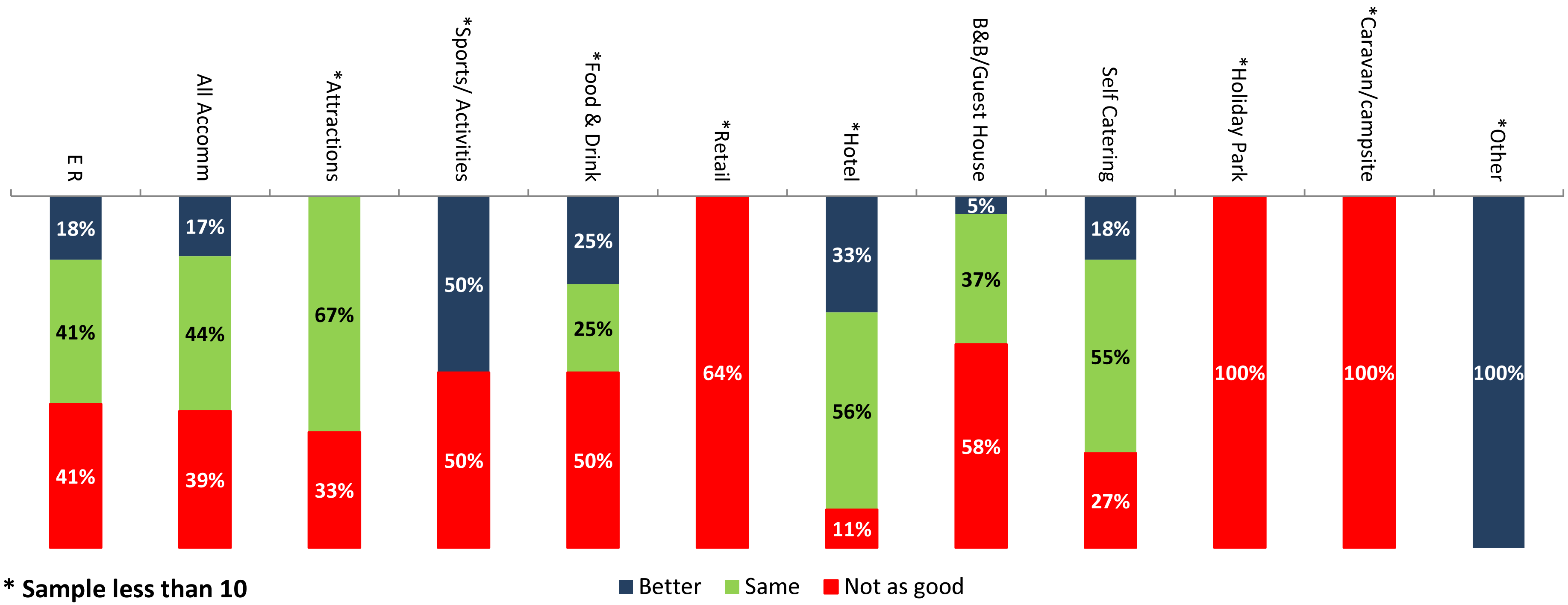


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	18%	25%	33%	-	100%	16%	23%	18%	25%	-	45%	75%
The same	41%	32%	67%	-	-	16%	35%	45%	33%	80%	15%	25%
Not as good	41%	43%	-	-	-	68%	42%	36%	42%	20%	40%	-
Base	51	179	<5	-	<5	31	79	22	12	5	20	<5

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

61% of all accommodation providers reported that their October 2014 booking levels were looking better than (17%) or the same as (44%) last year. 73% of Self Catering operators reported that their booking levels for October 2014 were looking better than or the same as October 2013. 58% of B&B/Guest Houses reported their booking levels as being lower than October 2013, along with 27% of Self Catering operators.

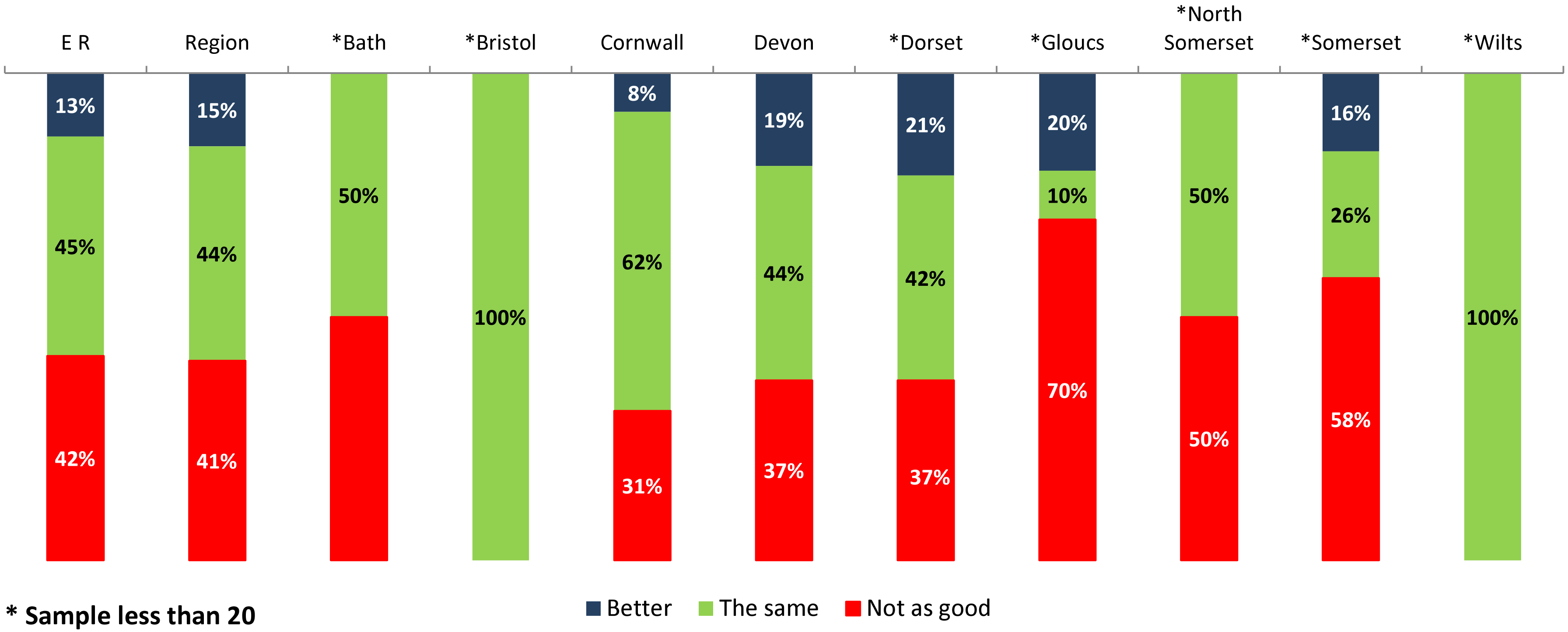


*** Sample less than 10**

Booking levels	ER	Accomm	*Attraction	*Sports/ Activities	*Food & Drink	*Retail	*SC Agency	*Other	*Hotel	B&B/ Guest House	Self Catering	*Holiday Park	*Caravan/ campsite	*Other
Better	18%	17%	-	50%	25%	-	-	-	33%	5%	18%	-	-	100%
Same	41%	44%	67%	-	25%	-	-	-	56%	37%	55%	-	-	-
Not as good	41%	39%	33%	50%	50%	100%	-	-	11%	58%	27%	100%	100%	-
Base	51	41	<5	<5	<5	<5	-	-	9	19	11	<5	<5	<5

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

58% of English Riviera businesses reported that their booking levels for November 2014 were looking better than (13%) or the same as (45%) November 2013, compared with 59% of businesses within the region as a whole and 63% of businesses in Devon. 42% of businesses reported that their November booking levels were looking worse than in 2013 compared with 41% of businesses in the region as a whole and 37% in Devon.

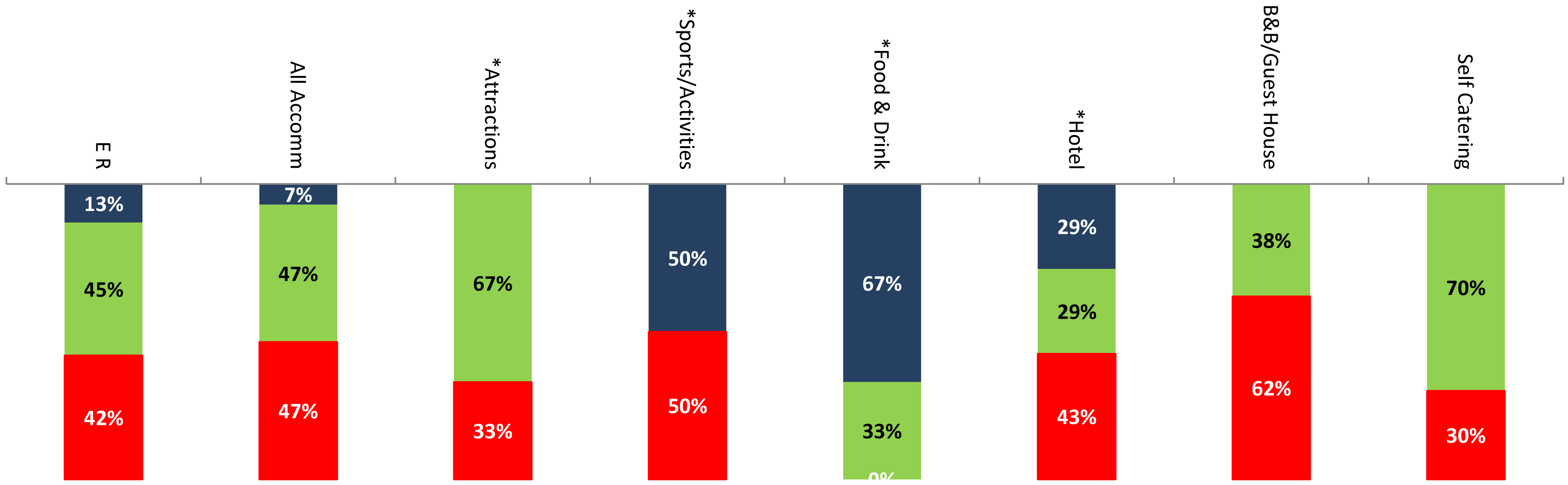


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	*Dorset	*Gloucs	*North Somerset	*Somerset	*Wilts
Better	13%	15%	-	-	-	8%	19%	21%	20%	-	16%	-
The same	45%	44%	50%	-	100%	62%	44%	42%	10%	50%	26%	100%
Not as good	42%	41%	50%	-	-	31%	37%	37%	70%	50%	58%	-
Base	38	150	<5	-	<5	26	63	19	10	<5	19	<5

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

54% of all accommodation providers reported that their November 2014 booking levels were looking better than (7%) or the same as 2013 (47%) whilst 47% said that they were looking worse than 2013. 70% of Self Catering operators reported that their booking levels were looking the same as November 2013 compared with 38% of B&B/Guest Houses. 62% of B&B/Guest Houses and 30% of Self Catering operators 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	*Other
Better	13%	7%	-	50%	67%	-	-	-	29%	-	-	-	-	-
Same	45%	47%	67%	-	33%	-	-	-	29%	38%	70%	-	-	-
Not as good	42%	47%	33%	50%	-	-	-	-	43%	62%	30%	-	-	-
Base	38	30	<5	<5	<5	-	-	-	7	13	10	-	-	-

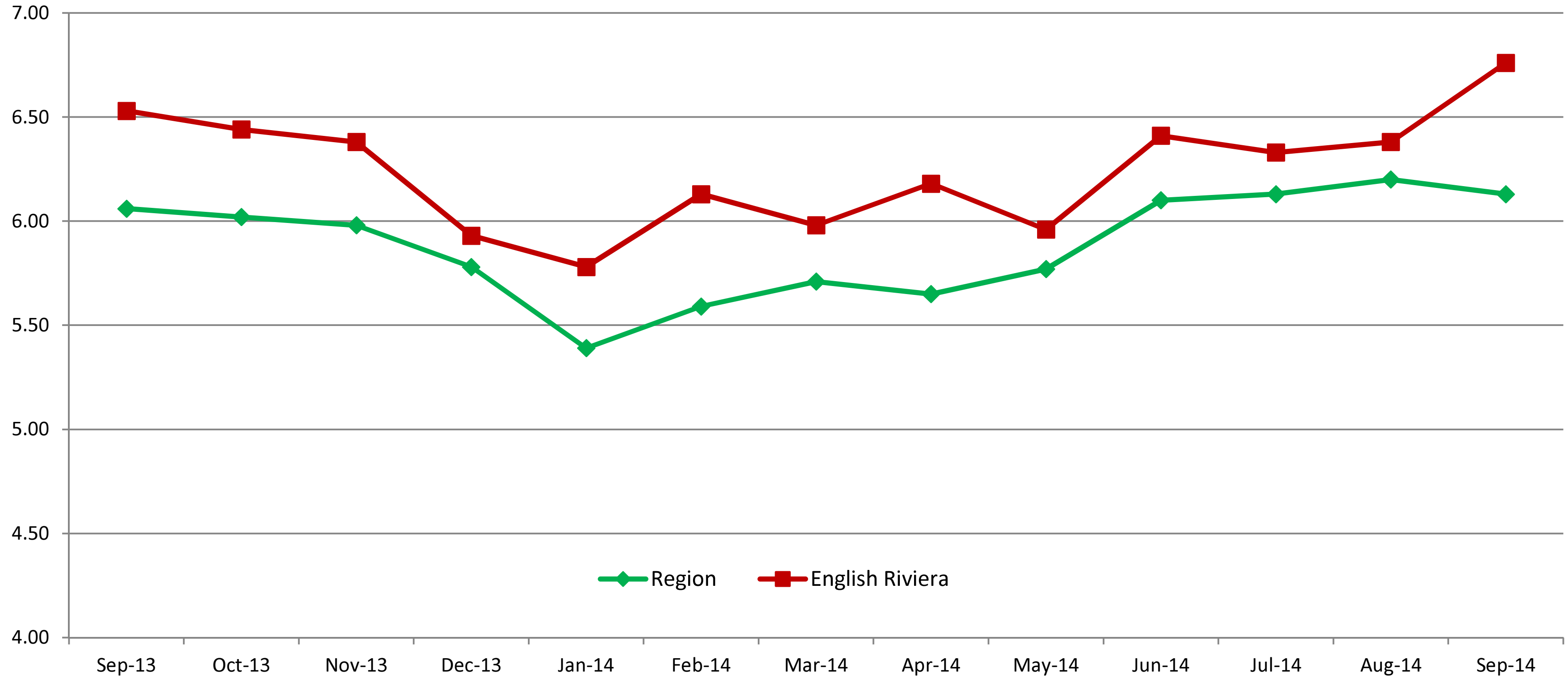
English Riviera Tourism Monitor

September 2014

Business Optimism

Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.76 for September 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. This is an increase compared with the optimism score recorded last month (6.38) and the highest optimism score recorded over the last 12 months. It also compares favourably with the South West regional score for September 2014 of 6.13.



Optimism	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sept-14
English Riviera	6.53	6.44	6.38	5.93	5.78	6.13	5.98	6.18	5.96	6.41	6.33	6.38	6.76
Region	6.06	6.02	5.98	5.78	5.39	5.59	5.71	5.65	5.77	6.10	6.13	6.20	6.13

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 29% of all respondents provided additional comments this month covering a variety of themes although, as was the case last month, the recent announcement of proposed funding cuts by the council on the English Riviera features highly.

It is a pity that so many B&B's only trade up to the VAT limit as it makes the town look half open/closed. Maybe there just isn't the custom to make it worthwhile for them.

I believe that Torquay is gradually turning a corner. The seafront looks better, the new development is bold and has lifted that area. The harbour is gradually improving. I hope the Torwood Street development happens soon as this will lift this part of town.

The good weather brought many of my regular guests for a holiday in 2014 and recommendations on Trip Advisor.

Business levels rely on footfall in the area - a run-down town centre with more & more brands pulling out doesn't help, neither does the poor decisions to unnecessarily prevent parking in the area (unjustified at the time, and still unjustifiable).

The weather in September did not have a positive effect on business levels which was surprising, maybe the phasing of the August public holiday and school return days.

Cheap hotels undercutting us all the time, especially for coaches.

Our business caters for mostly local people, and parking is a huge issue.

October is proving to be a lot tougher than many recent one's. It is a real battle to try and fill rooms. It feels as if the economic recession is biting (albeit two or three years late). I think it tends to indicate that there is an issue with the cost of living.... Also still the uncertainty over the future of the ERTC itself. We need really good promotion going into 2015 not an organisation that is struggling to survive.

Business has been good, but we are nervous about the future because of the budget cuts by the council. Tourism seems to be targeted, whether it be the ERTC or the Torbay and Coastal Trust. These services and attractions are critical to the economic future of the bay, however our council seems to have a difference of opinion which is both illogical and somewhat scary.

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

The South West Research Company