English Riviera Tourism Monitor

February 2014

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

April 2014

Executive Summary

Compared to February 2013 businesses reported that:

February 2014 Visitor levels:

Increased 27% / Stayed the same 19% / Decreased 53%

Estimated actual change in visitors -7.9%

February 2014 Turnover levels:

Increased 30% / Stayed the same 17% / Decreased 54%

Estimated actual change in turnover -10.4%

February 2014 Profitability was:

Higher 22% / Stayed the same 31% / Decreased 46%

March 2014 Outlook is:

Better 24% / Same as last year 34% / Not as good 43%

Easter 2014 Outlook is:

Better 15% / Same as last year 32% / Not as good 53%

Optimism

Optimism score is 6.13 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.

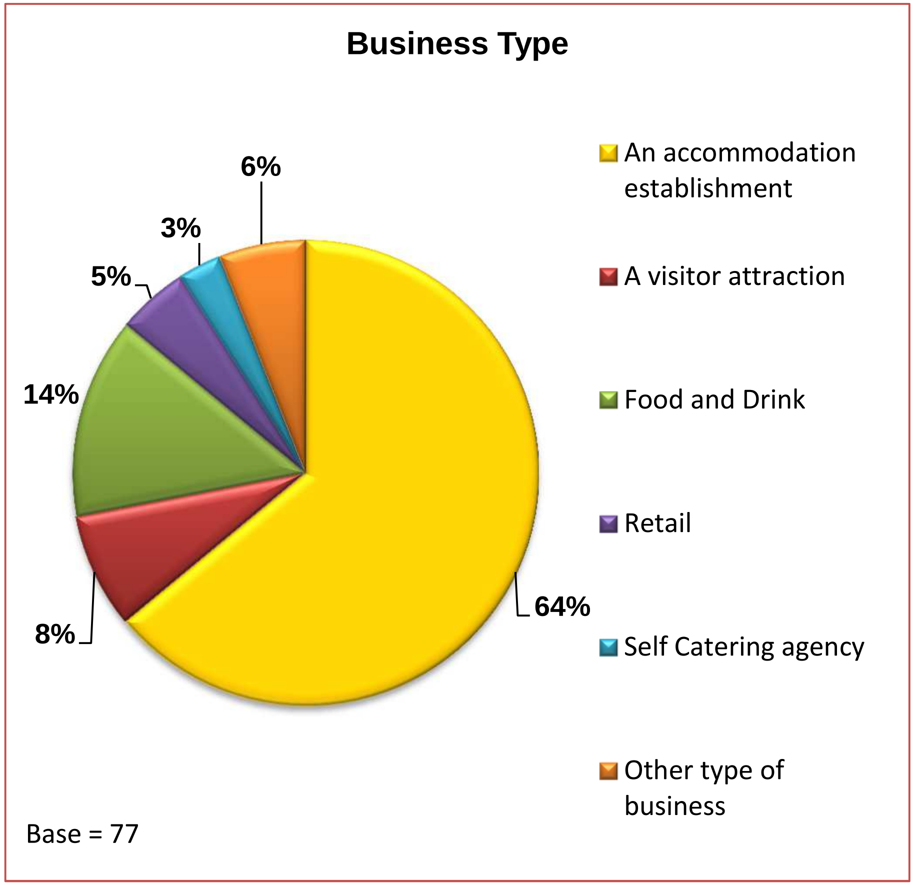
Wherever possible, this report will provide comparisons against regional data to enable the ERTC to benchmark its performance.

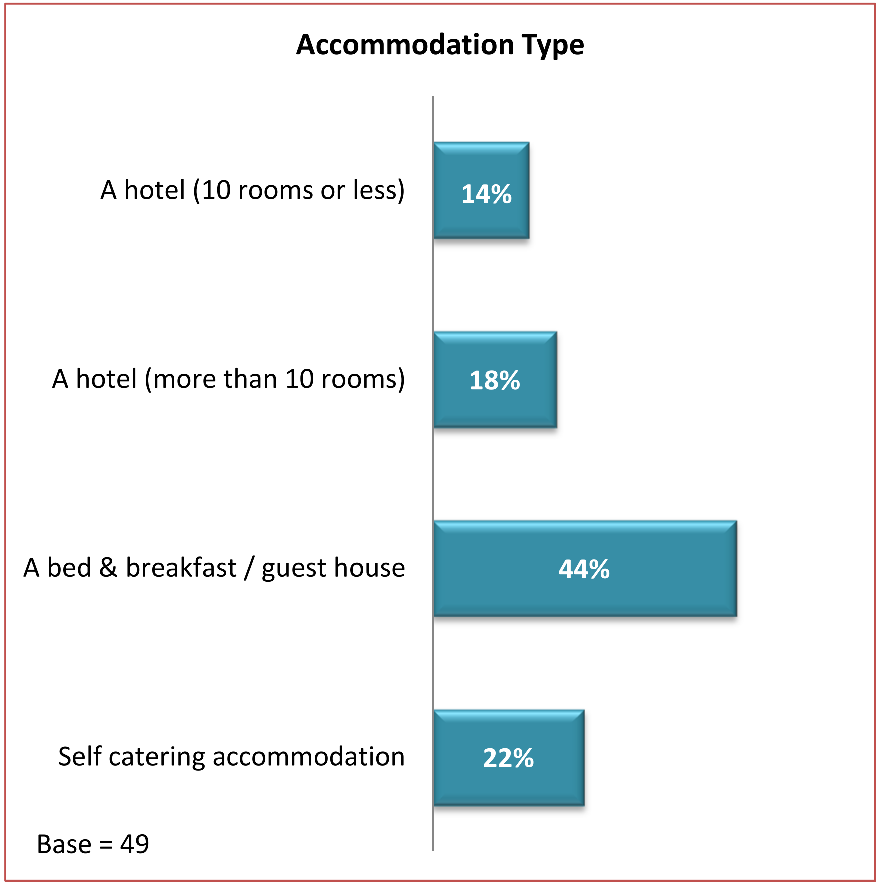
English Riviera Tourism Monitor

February 2014

Sample Profile

Business Type

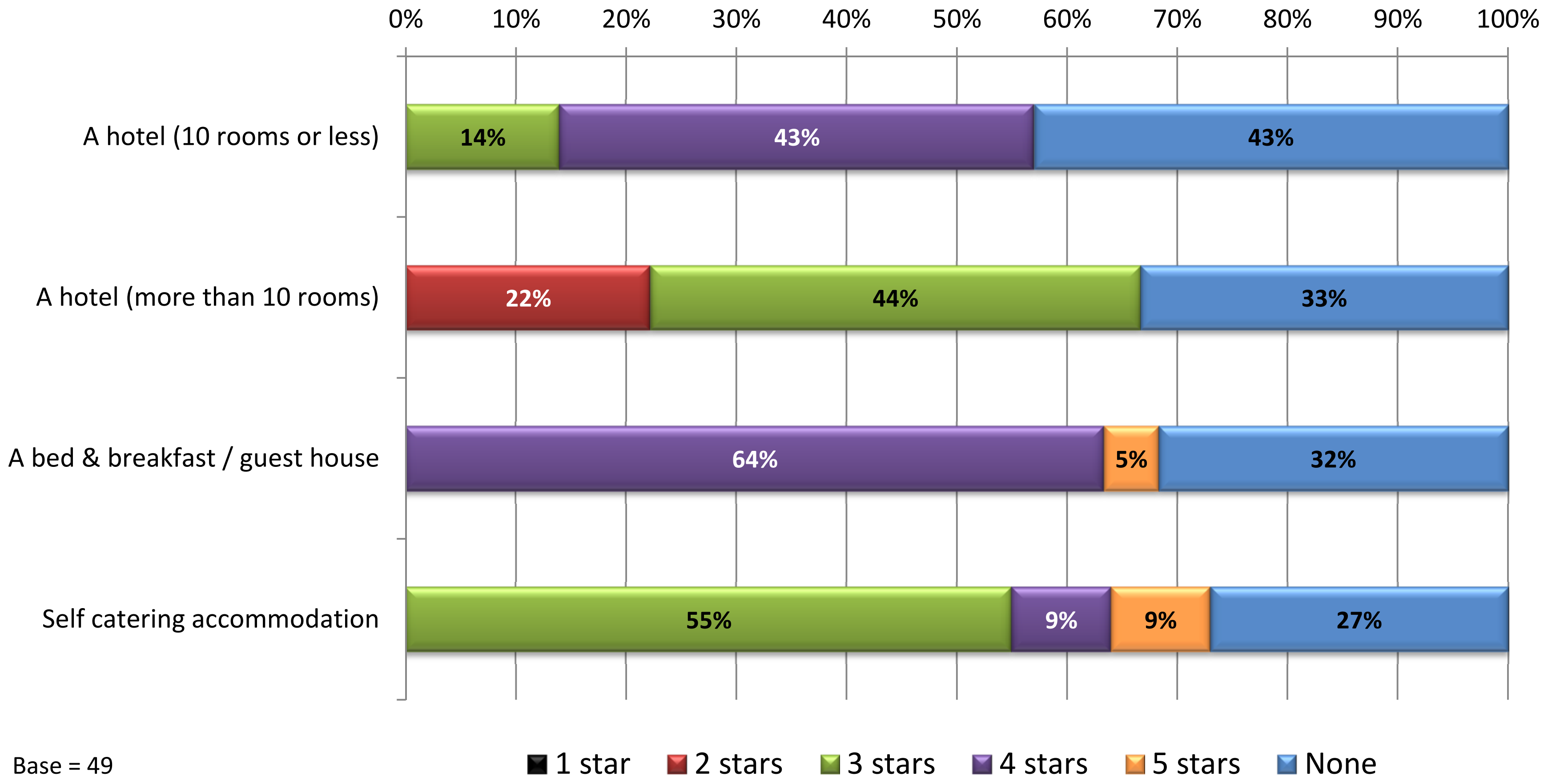




Accommodation providers account for 64% of responses, Food & Drink establishments 14% and Visitor Attractions 8%.

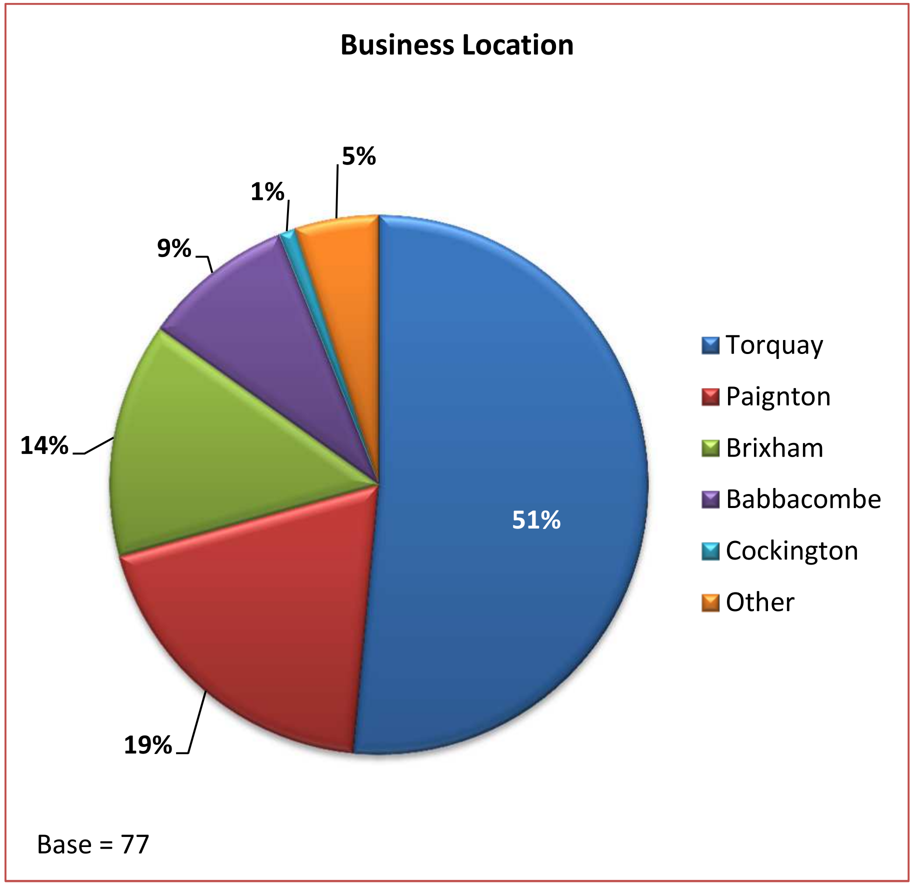
Serviced accommodation providers account for 76% of accommodation responses.

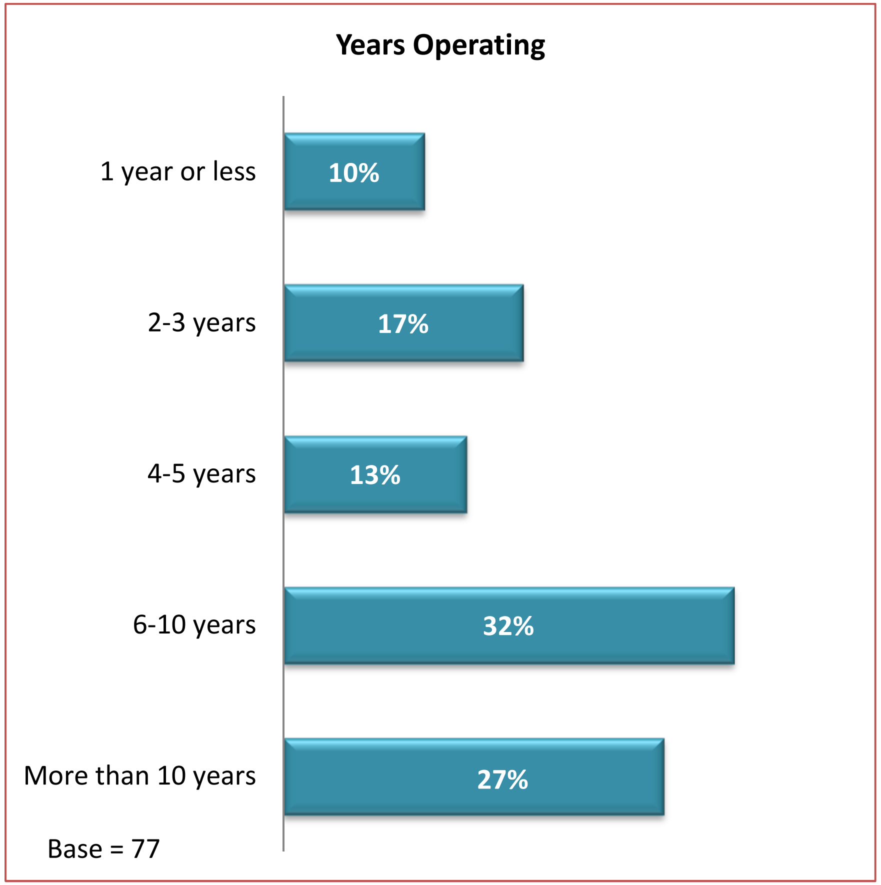
Accommodation Type and Rating



The majority of businesses responding to this survey have a quality rating, although 43% of Hotels with 10 rooms or less, 33% of Hotels with more than 10 rooms, 32% of B&B/Guest Houses and 27% of Self Catering accommodation providers are not graded.

Business Location and Years Operating





Torquay businesses account for 51% of responses with 19% from Paignton. A further 14% of businesses were from Brixham, 9% from Babbacombe and 1% from Cockington. 5% of businesses were based elsewhere in the resort.

59% of businesses have been operating for more than 6 years.

English Riviera Tourism Monitor

February 2014

The Month in Context

February 2014 – The Month in Context

The UK Weather

February was another stormy, very unsettled and wet month. During the first half, the weather was dominated by a succession of major winter storms, continuing a sequence from late January, bringing strong winds, heavy rain and significant weather impacts including extensive flooding across the Somerset Levels and from the River Thames. Huge waves also made conditions extremely dangerous around the coastline of Wales and southern England. Although the exceptionally stormy weather ended on the 15th, the rest of the month remained very unsettled. However, conditions were mild with any snow confined to the Scottish mountains.

It was a mild month with the UK mean temperature 5.2 °C, which is 1.5 °C above the 1981-2010 long-term average, and the number of air frosts among the lowest in the last 50 years. The UK overall received 184% of average rainfall, making it the 4th wettest February in the historical series. A broad region covering most of Wales and southern England received more than double the average rainfall for February, as did some other areas; a few places had close to three times the average. The region of south-east and central southern England, with 270% of normal, was only just short of its February rainfall record. It was not so wet everywhere though, and parts of Lincolnshire, north-east England and north-east Scotland received near average rainfall. There was a general division in sunshine across the country; despite being so wet the south-east of the UK was sunnier than average whereas some western areas were duller than average. The UK overall received 108% of average sunshine hours.

A maximum temperature of 14.9 °C was recorded at Kew Gardens, St James's Park and Heathrow (all Greater London) on the 24th. A minimum temperature of -7.7 °C was recorded at Altnaharra (Sutherland) on the 17th. In the 24 hours ending at 0900 GMT on the 23rd, 125.6 mm of rain fell at Altdearg House, near Sligachan (Isle of Skye). A wind gust of 109 mph was recorded at Needles Old Battery (Isle of Wight) on the 14th. A snow-depth of 20 cm was measured at Tulloch Bridge (Highland) at 0900 GMT on the 12th.

Source: Met Office

February 2014 – The Month in Context

Weather impacts

The month began as January had ended, with a succession of violent winter storms bringing heavy rain and strong winds, separated by only brief quiet interludes. Many weather warnings were issued, almost all for heavy rain or severe gales, including a Red warning for storm-force winds over parts of Wales and north-west England on the 12th. Parts of the Somerset Levels remained under water for most of the month and some villages were only accessible by boat. River levels in the Thames gave cause for concern with severe flooding in parts of Oxfordshire, Berkshire and Surrey. The river Severn flood plain was also inundated. The Environment Agency reported at least 6000 properties flooded, and at the height of the storms more than 15 severe flood warnings were in place for the coast of southern England, the Somerset Levels and the Thames valley. Transport infrastructure and agriculture were also badly affected by the storms and floods.

The combination of storm force winds, high tides, and tidal surges led to some dangerous and damaging conditions around the coastlines of the south and west. The key rail link towards Cornwall was severed at Dawlish on 5th due to large waves. Many coastal communities in Cornwall, Devon and Dorset experienced coastal flooding and damage to infrastructure, buildings and sea defences. The damage was exacerbated by the cumulative effect of the sequence of storms arriving in rapid succession.

Many trees were felled by the wind and on 12 February around 100,000 homes and businesses were without power. Several buildings experienced structural damage from the strong winds. For example, the storm of 12 February resulted in some damaged roofs at Porthmadog, Gwynedd and a member of the public was killed on 13 February after trees brought down power lines in Wiltshire. A motorist was killed in central London on 14 February after falling masonry struck a car.
Although there were no significant snowfalls at low levels during February, Scotland's mountains had very deep lying snow at higher elevations, with significant avalanches occurring during the second half of the month.

Source: Met Office

February 2014 – The Month in Context

The UK Economy

Increased business investment helped to lift growth in the final three months of 2013, official figures published during February 2014 have shown. The Office for National Statistics (ONS) confirmed that the economy grew by 0.7% in the quarter, unchanged from its previous estimate.

However, its estimate for growth in 2013 as a whole was cut to 1.8% from the initial reading of 1.9%. The ONS said business investment in the fourth quarter rose 2.4% from the previous three-month period. Business investment was also up 8.5% from a year earlier.

Other factors helping growth in the final quarter of 2013 included a 0.4% rise in household spending and a similar contribution from net trade, as the balance between imports and exports improved. Recent business surveys have suggested that the recent upturn in the UK economy has continued into 2014.

David Kern, chief economist at the British Chambers of Commerce, said the latest ONS figures were "positive news" and would underpin business confidence. But he added it was now "important to improve the quality of Britain's recovery".
"While it is encouraging that consumer spending is growing, we need to rely more on investment and net exports. These figures show a small move in the right direction, but there is still more to do.“

Neil Prothero, deputy chief economist at manufacturers' organisation EEF, said the "key question" for 2014 was whether companies were feeling confident to translate "investment intentions to concrete action". "Next month's Budget must send out a powerful signal that government will continue to act on delivering a competitive business environment that will give the private sector confidence to invest," he added.

Source: The BBC

February 2014 – The Month in Context

The UK Economy

The recent recovery in the economy has raised the question of when the Bank of England will raise rates from their current historic low of 0.5%. Recent comments from Bank of England policymakers have indicated that rates will rise in the first half of 2015.

David Miles, member of the Bank of England's Monetary Policy Committee (MPC), told the BBC on Wednesday that interest rates would not rise in the next few months, adding the MPC was "not in a hurry" put rates up. He said: "It may be that sometime next year might be the right time [to raise interest rates]. It is difficult to predict in advance.“ The rise would be very gradual, when it did occur, he said.

After the recent experience of falling real wages, Mr Miles said that as the economy continued to recover, wages would rise faster than inflation.   "It has been an extraordinary period, an extremely painful period, which has lasted five years, with people's incomes falling," he said.

Source: The BBC

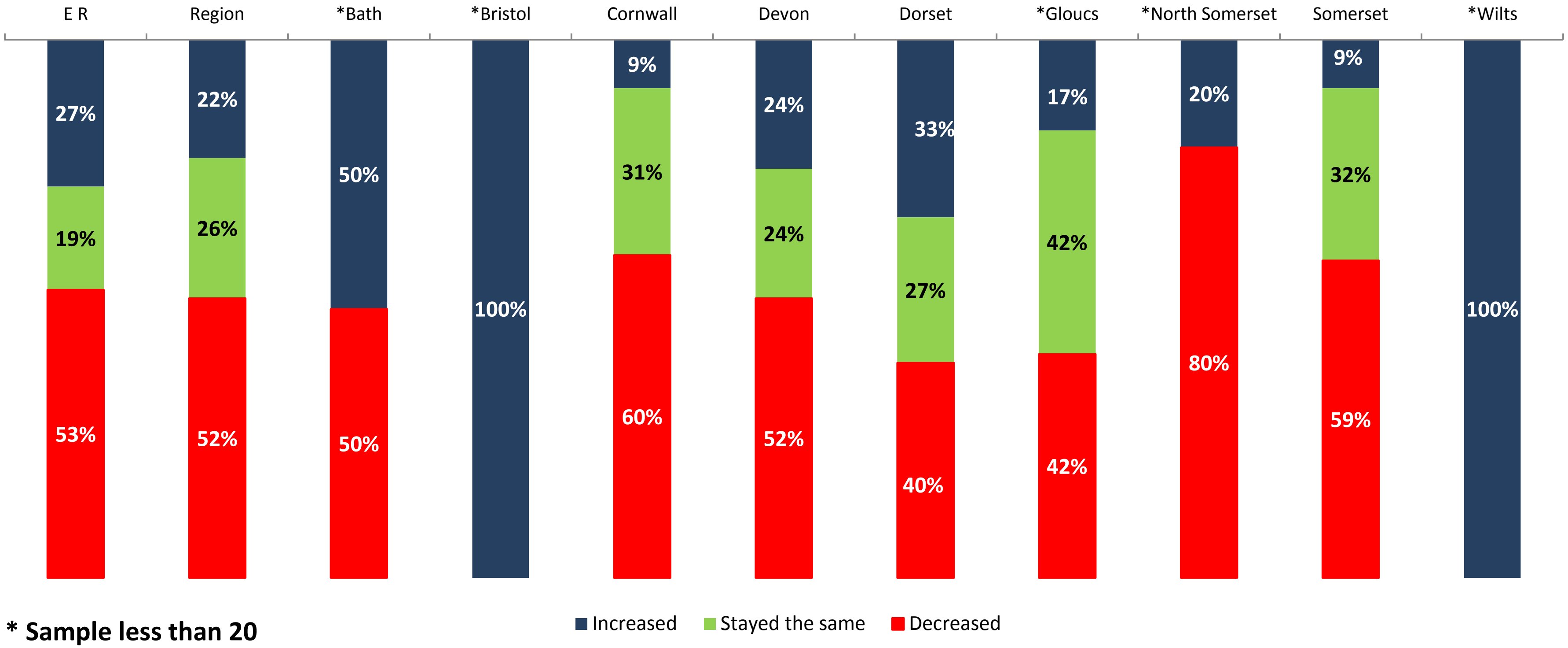
English Riviera Tourism Monitor

February 2014

Performance

Performance – Visitor Numbers (2014-2013)

53% of English Riviera businesses reported that their visitor numbers had decreased compared with February 2013 – a similar proportion to the region as a whole (52%). 46% of businesses indicated that their visitor numbers had increased (27%) or remained level (19%) compared with the same time last year (48% regionally).



*** Sample less than 20**

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	27%	22%	50%	-	100%	9%	24%	33%	17%	20%	9%	100%
Stayed the same	19%	26%	-	-	-	31%	24%	27%	42%	-	32%	-
Decreased	53%	52%	50%	-	-	60%	52%	40%	42%	80%	59%	-
Base	73	232	2	-	1	35	105	30	12	5	34	6

Performance – Estimated occupancy levels February 2014

The slides to follow show the estimated occupancy for February 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	47.32%	30
All hotels	52.05%	13
Hotel 10 rooms or less	14.78%	5
Hotel more than 10 rooms	54.40%	8
B&B	18.40%	7
Guest House	17.22%	10
Torquay	49.69%	18
Paignton	30.84%	8
Brixham	36.51%	<5
Babbacombe	0.00%	<5
**Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	44.94%	43
South West	47.12%	83

English Riviera serviced room occupancy was calculated at 47.32% for February 2014 compared with an average of 47.12% for the South West region as a whole during the same period.

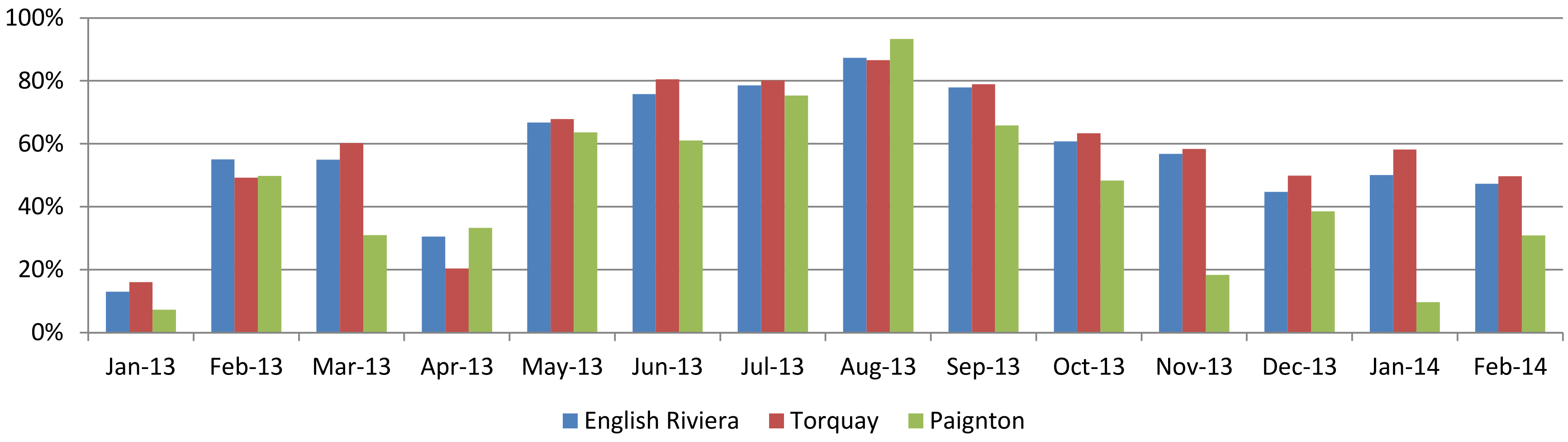
Self-catering unit occupancy for the English Riviera for February 2014 was calculated at 34.23% compared with 12.88% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY

Feb-14	% UNIT OCC	SAMPLE
English Riviera	34.23%	9
Self-catering accommodation	34.23%	9
Holiday Park	0.00%	0
Torquay	29.59%	<5
Paignton	78.01%	<5
Brixham	5.21%	<5
Babbacombe	27.98%	<5
Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	35.44%	17
South West	12.88%	57

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

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



SERVICED ROOM OCCUPANCY	Jan-13	Feb-13	Mar-13	Apr-13	May-13	June-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	2013 overall	Jan-14	Feb-14
English Riviera	13.01%	55.01%	54.95%	30.50%	66.73%	75.79%	78.61%	87.34%	77.96%	60.75%	56.83%	44.72%	58.52%	50.07%	47.32%
Torquay	16.05%	49.24%	60.20%	20.32%	67.83%	80.50%	80.10%	86.56%	78.96%	63.34%	58.40%	49.88%	59.28%	58.22%	49.69%
Paignton	7.28%	49.79%	30.99%	33.32%	63.60%	61.06%	75.31%	93.28%	65.84%	48.34%	18.32%	38.51%	48.80%	9.63%	30.84%
Brixham	*	*	*	*	*	*	*	82.19%	*	*	*	*	*	*	*
Babbacombe	10.38%	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Cockington	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Other English Riviera	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*

*** Sample size less than 5**

Performance – South West estimated serviced accommodation occupancy levels 2014 by area

During the month of February 2014 English Riviera serviced occupancy was higher than all other areas including the South West region as a whole, with the exception of Wiltshire.

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

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14
South West	46.15%	47.12%
BANES	*	*
Bristol	*	*
Cornwall	*	36.61%
Devon	47.35%	44.94%
English Riviera	**50.07%**	47.32%
Dorset	54.58%	27.23%
Gloucestershire	*	*
Somerset	32.48%	46.42%
Wiltshire	56.85%	59.82%

*** Sample size less than 5**

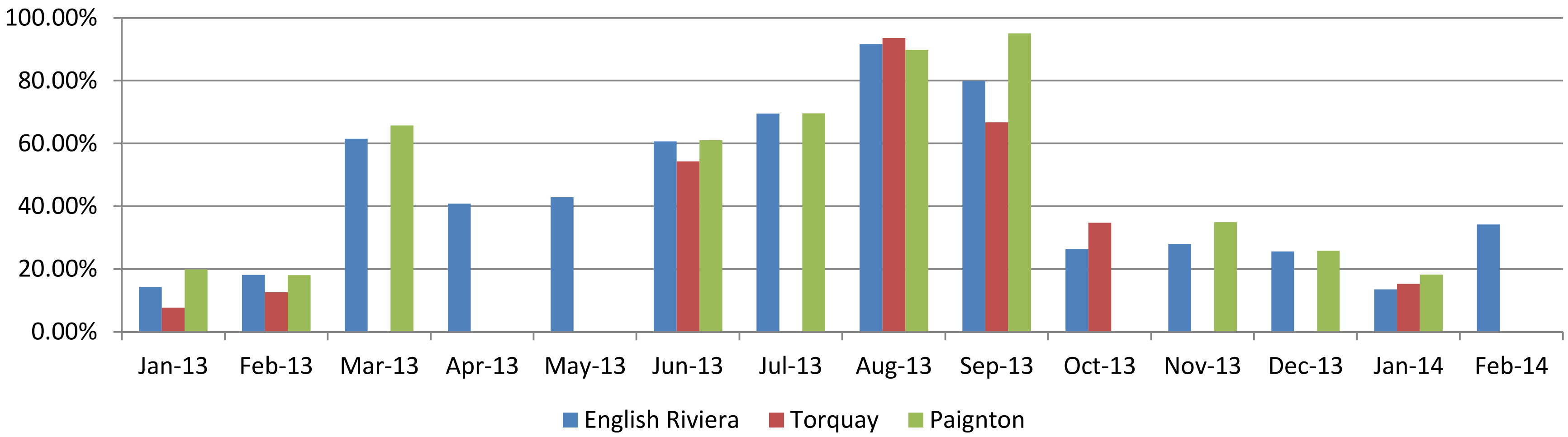
Performance – Estimated serviced accommodation occupancy levels 2014 by type

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

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14
All ER hotels	**55.42%**	**52.05%**
All SW hotels	50.76%	51.93%
ER Hotel 10 rooms or less	**12.36%**	**14.78%**
SW Hotel 10 rooms or less	19.22%	26.75%
ER Hotel more than 10 rooms	**57.54%**	**54.40%**
SW Hotel more than 10 rooms	52.93%	56.10%
ER B&B/Guest House	**8.34%**	**17.56%**
SW B&B/Guest House	23.00%	26.78%

*** Sample size less than 5**

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



SELF-CATERING UNIT OCCUPANCY	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	2013 overall	Jan-14	Feb-14
All ER Self-catering	14.23%	18.19%	61.52%	40.88%	42.86%	60.65%	69.57%	91.68%	79.96%	26.37%	28.01%	25.64%	46.63%	13.52%	34.23%
Torquay	7.76%	12.64%	*	*	*	54.34%	*	93.62%	66.74%	34.79%	*	*	*	15.30%	*
Paignton	19.86%	18.06%	65.76%	*	*	61.05%	69.66%	89.78%	95.12%	*	34.90%	25.76%	*	18.22%	*
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 February 2014 English Riviera self-catering unit occupancy was higher than all other areas including the South West region as a whole, with the exception of Devon.

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

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14
South West	16.89%	12.88%
BANES	*	*
Bristol	*	*
Cornwall	15.25%	12.77%
Devon	12.76%	35.44%
English Riviera	**13.52%**	**34.23%**
Dorset	19.71%	7.40%
Gloucestershire	*	7.06%
Somerset	19.23%	4.88%
Wiltshire	*	0.00%

*** Sample size less than 5**

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

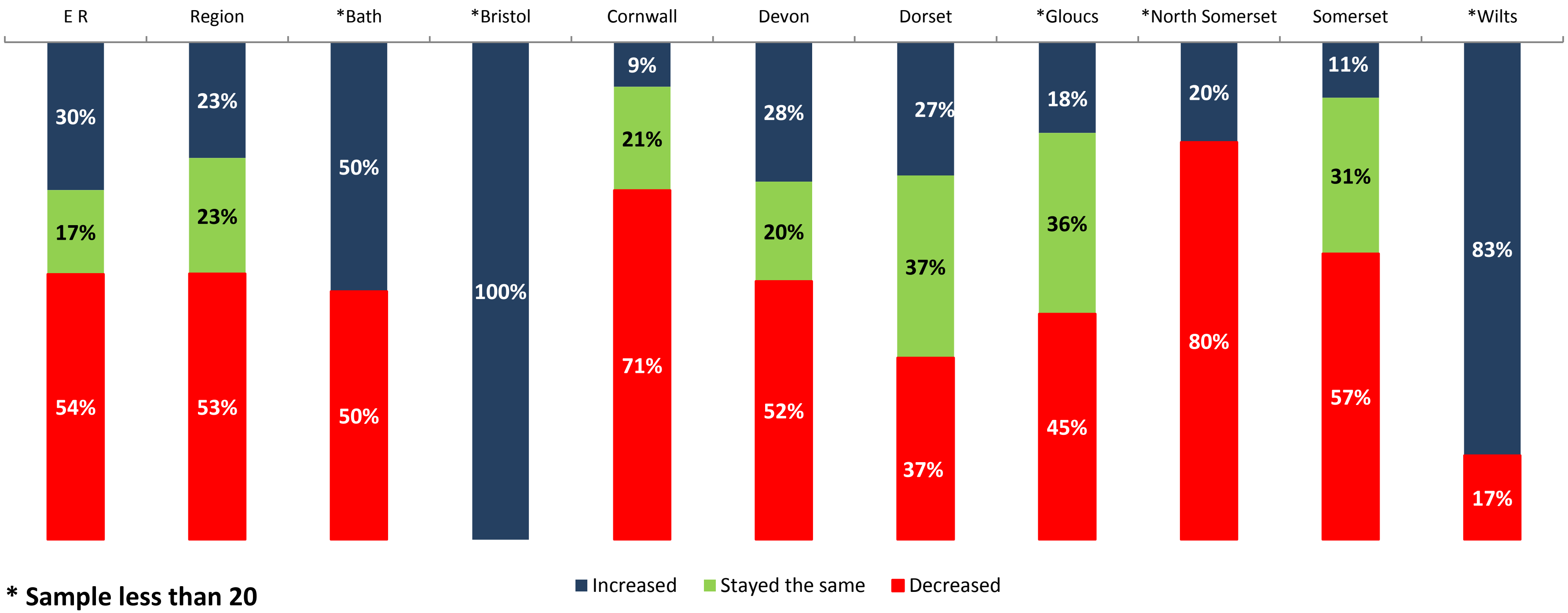
Key comparisons;
All ER Self-catering – Higher than the regional average during February 2014.
ER Self-catering (not including Holiday Parks) – Higher than the regional average in February 2014.

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14
All ER Self-catering	**13.52%**	**34.23%**
All SW Self-catering	16.89%	21.04%
ER Self-catering	**13.52%**	**34.23%**
SW Self-catering	16.89%	21.04%
ER Holiday Park	*	*
SW Holiday Park	*	*

*** Sample size less than 5**

Performance – Turnover (2014-2013)

54% of English Riviera businesses reported decreased turnover during February 2014 compared with February 2013, a similar proportion when compared with the region as a whole during the same period (53%). However, 30% of English Riviera businesses reported increased turnover during February 2014 compared with 23% of businesses for the region as a whole.



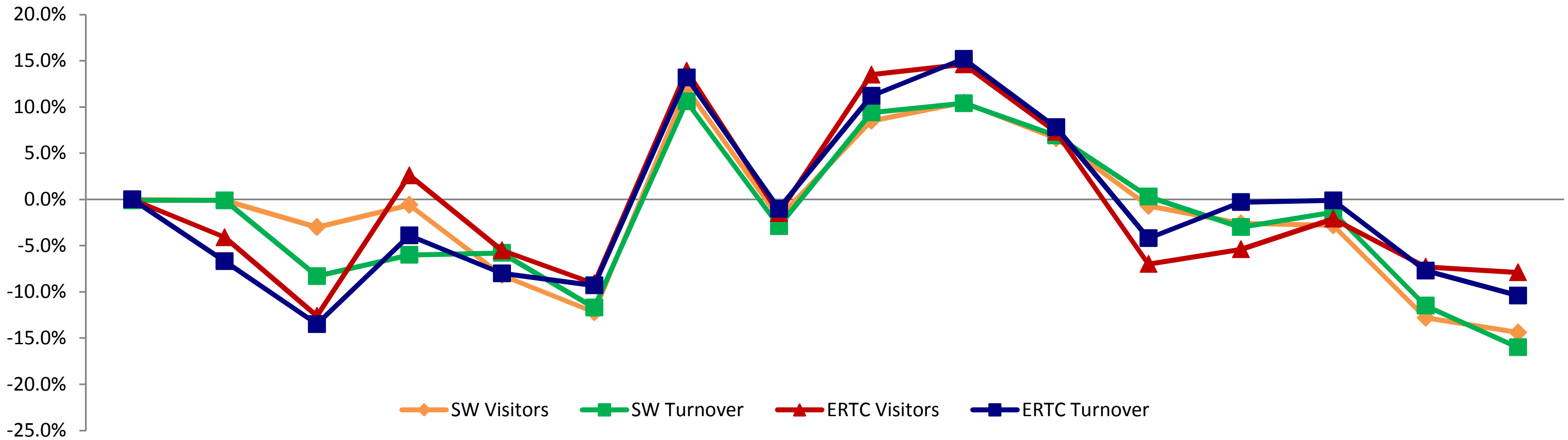
*** Sample less than 20**

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	30%	23%	50%	-	100%	9%	28%	27%	18%	20%	11%	83%
Stayed the same	17%	23%	-	-	-	21%	20%	37%	36%	-	31%	-
Decreased	54%	53%	50%	-	-	71%	52%	37%	45%	80%	57%	17%
Base	71	226	2	-	1	34	101	30	11	5	35	6

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 February 2014 English Riviera businesses reported decreases of -7.9% in terms of visitors and -10.4% in terms of turnover compared with February 2013 and compare favourably against the regional averages of -14.4% and -16.0% in terms of visitors and turnover during the same period.

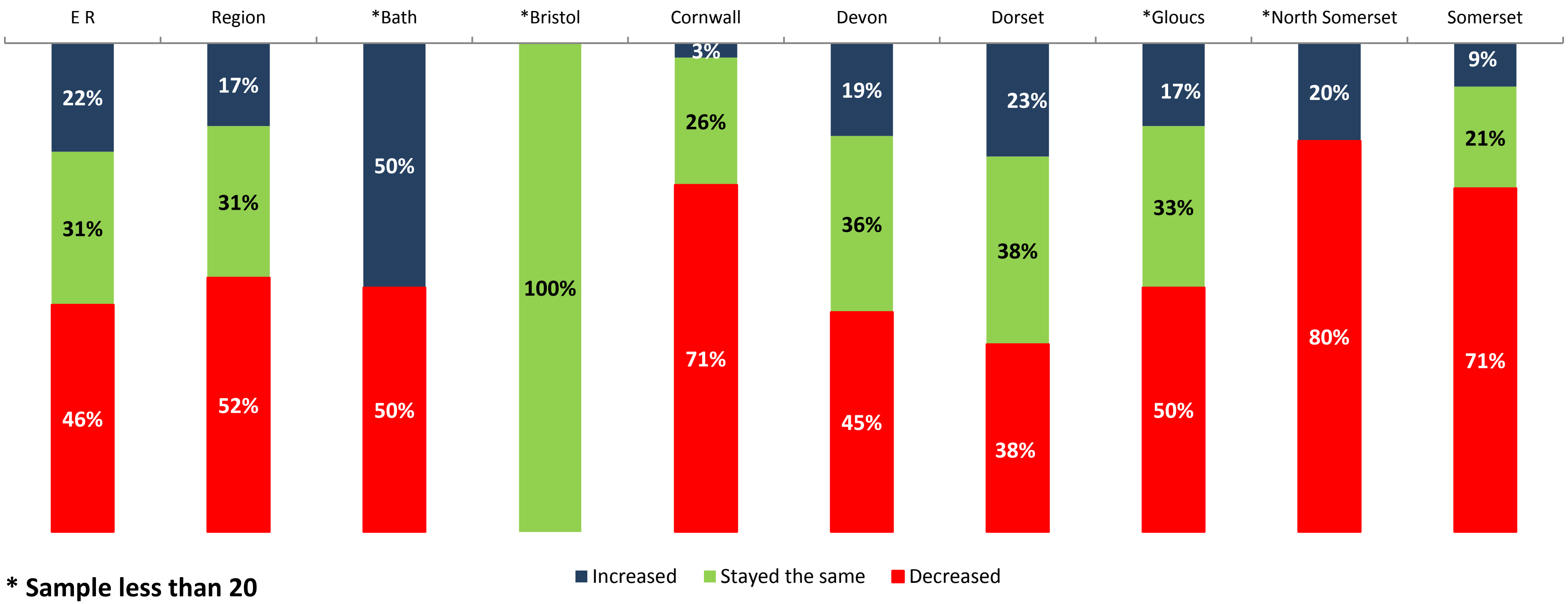
ERTC	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14
Visitors	0.0%	-4.1%	-12.6%	2.6%	-5.5%	-9.1%	13.9%	-1.5%	13.5%	14.6%	7.3%	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%
Turnover	0.0%	-6.7%	-13.5%	-3.9%	-8.0%	-9.3%	13.2%	-1.0%	11.2%	15.2%	7.8%	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%



Region	Nov-12	Dec-12	Jan-13	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
Visitors	0.0%	-0.1%	-3.0%	-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%
Turnover	-0.1%	-0.1%	-8.3%	-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%

Performance – Profitability (2014-2013)

53% of all English Riviera businesses reported increased (22%) or level profitability (31%) for the month, compared with 48% of businesses in the SW region as a whole during the same period. 46% of businesses reported theirs as being lower than during February 2013 (52% of SW businesses).



*** Sample less than 20**

Profitability	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	22%	17%	50%	-	-	3%	19%	23%	17%	20%	9%	67%
Stayed the same	31%	31%	-	-	100%	26%	36%	38%	33%	-	21%	33%
Decreased	46%	52%	50%	-	-	71%	45%	38%	50%	80%	71%	-
Base	67	213	2	-	1	31	95	26	12	5	34	6

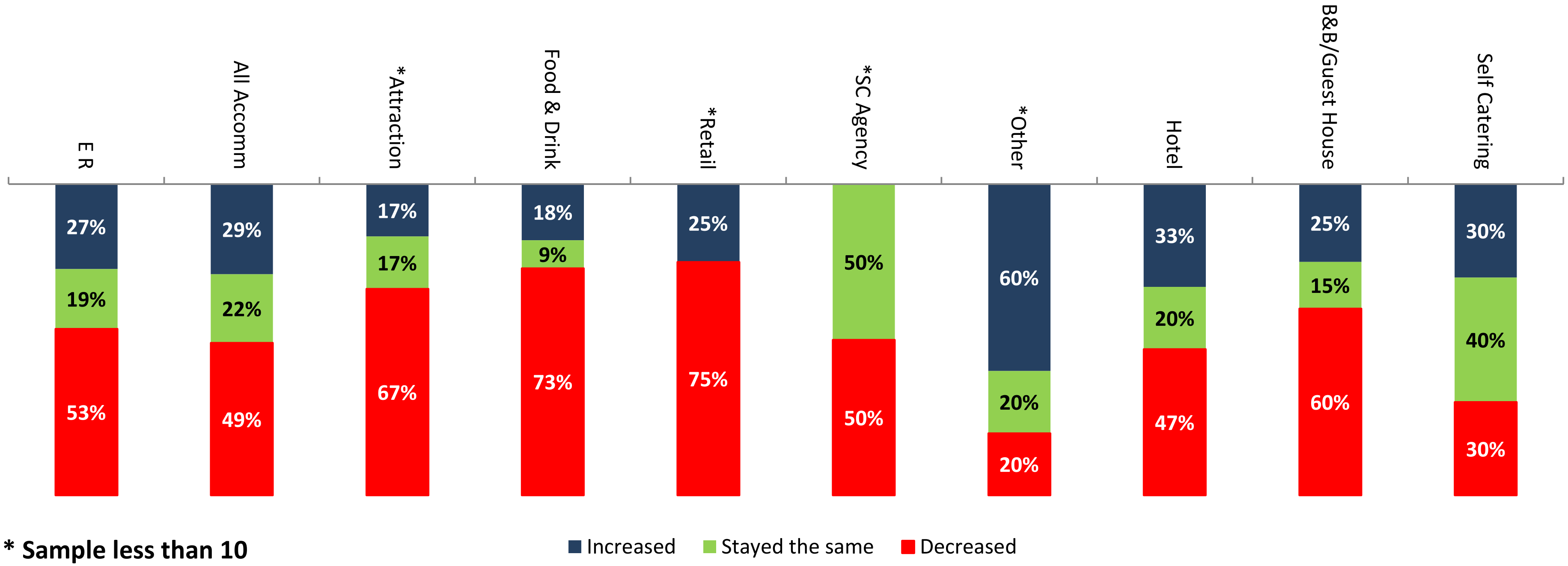
English Riviera Tourism Monitor

February 2014

Business Type Performance

Business Type Performance – Visitor numbers (2014-2013)

51% of all accommodation providers reported increased (29%) or level (22%) visitor numbers for February 2014 compared with 27% of food and drink providers. 70% of Self Catering operators and 53% of Hotels reported increased or level visitor numbers for February 2014 compared with the same time last year. In contrast, 60% of B&B/Guest Houses reported decreased visitor numbers compared with February 2013.

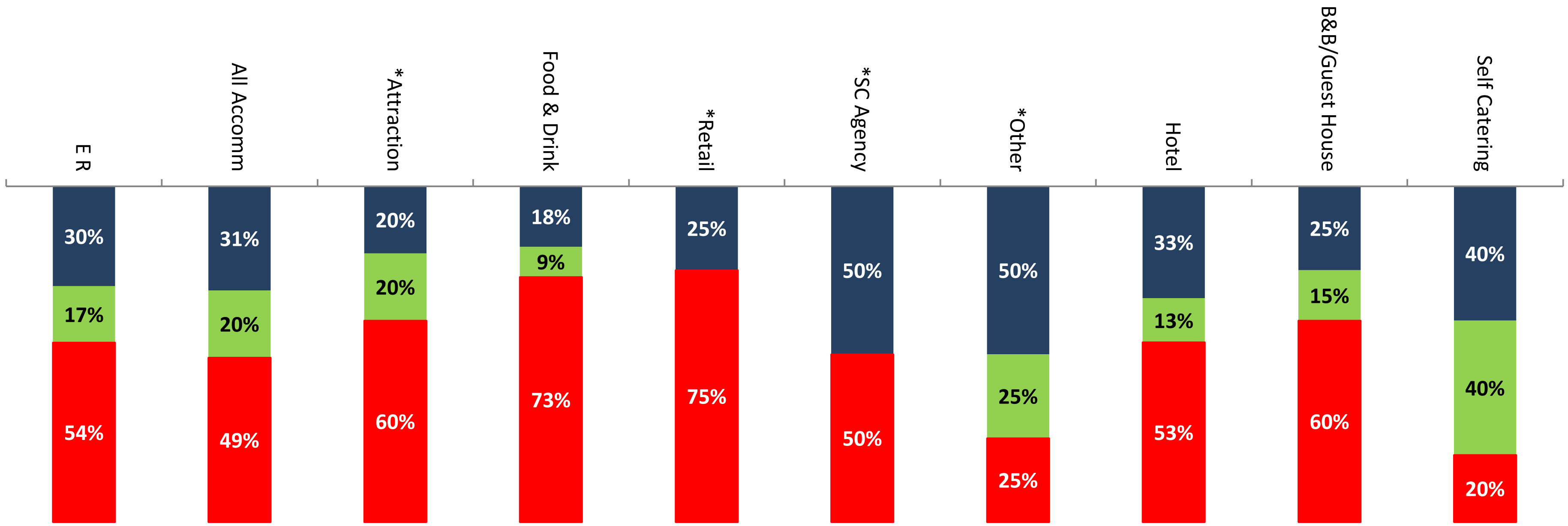


*** Sample less than 10**

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	27%	29%	17%	-	18%	25%	-	-	60%	33%	25%	30%	-	-
Stayed the same	19%	22%	17%	-	9%	-	-	50%	20%	20%	15%	40%	-	-
Decreased	53%	49%	67%	-	73%	75%	-	50%	20%	47%	60%	30%	-	-
Base	73	45	6	-	11	<5	-	<5	<5	15	20	10	-	-

Business Type Performance – Turnover (2014-2013)

51% of all accommodation providers reported increased (31%) or level turnover (20%) for February 2014 compared with 27% of food and drink providers. 80% of Self Catering operators reported increased or level turnover for February 2014 compared with the same time last year. 60% of B&B/Guest Houses and 53% of Hotels reported decreased turnover compared with February 2013.

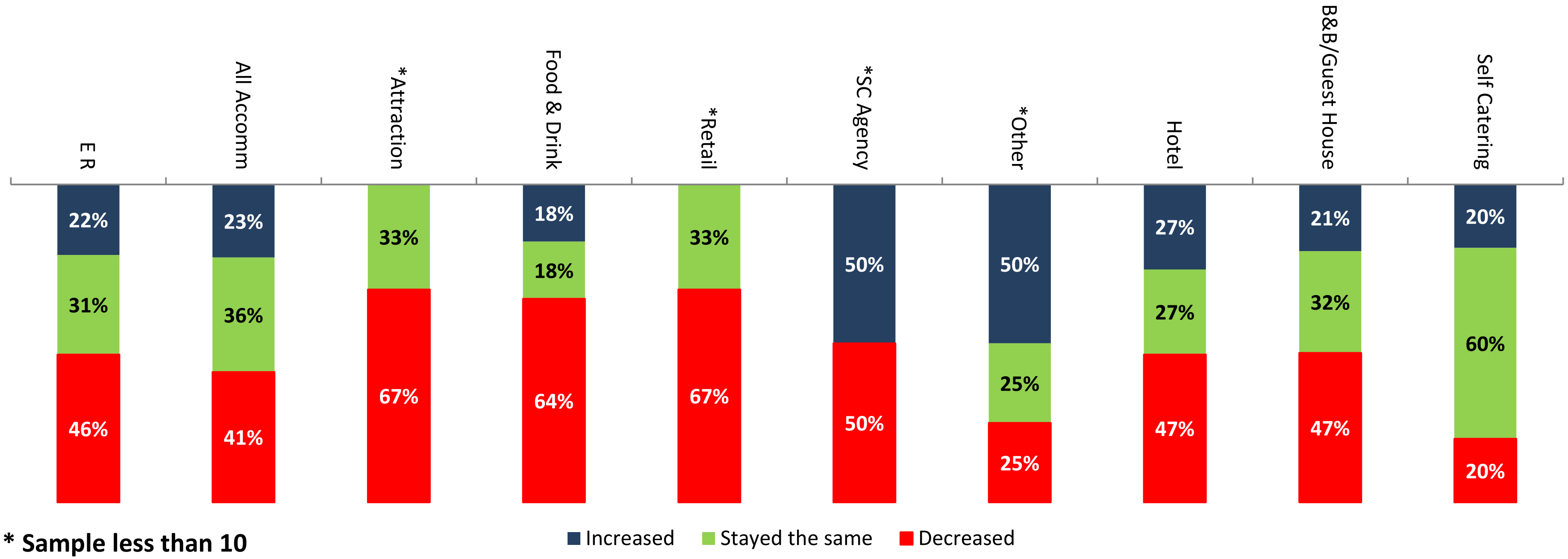


*** Sample less than 10**

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	30%	31%	20%	-	18%	25%	-	50%	50%	33%	25%	40%	-	-
Stayed the same	17%	20%	20%	-	9%	-	-	-	25%	13%	15%	40%	-	-
Decreased	54%	49%	60%	-	73%	75%	-	50%	25%	53%	60%	20%	-	-
Base	71	45	5	-	11	<5	-	<5	<5	15	20	10	-	-

Business Type Performance – Profitability (2014-2013)

59% of all accommodation providers reported increased (23%) or level (36%) profitability for February 2014 compared with 36% of food and drink providers. 80% of Self Catering operators, 54% of Hotels and 53% of B&B/Guest Houses reported increased or level profitability for February 2014 compared with the same time last year. In contrast, 47% of Hotels and B&B/Guest Houses in each case reported decreased profitability compared with the February 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	22%	23%	-	-	18%	-	-	50%	50%	27%	21%	20%	-	-
Stayed the same	31%	36%	33%	-	18%	33%	-	-	25%	27%	32%	60%	-	-
Decreased	46%	41%	67%	-	64%	67%	-	50%	25%	47%	47%	20%	-	-
Base	67	44	<5	-	11	<5	-	<5	<5	15	19	10	-	-

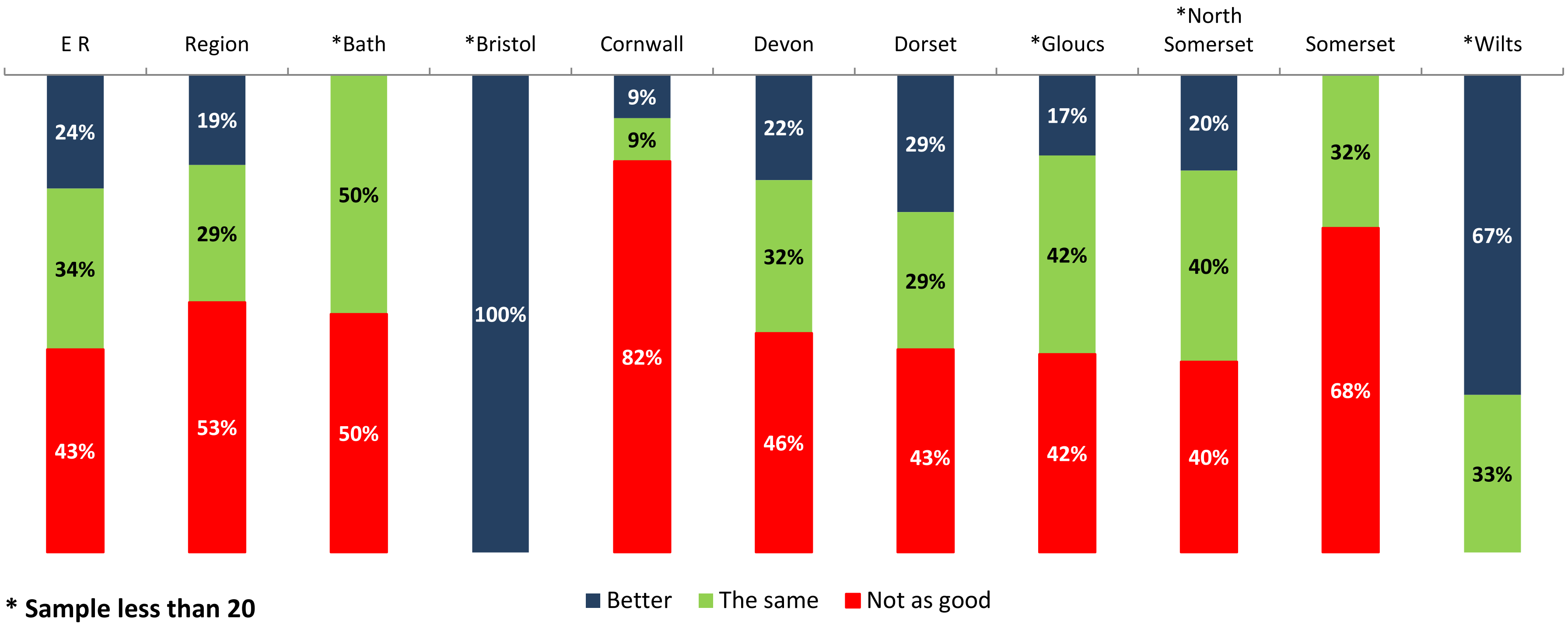
English Riviera Tourism Monitor

February 2014

Looking Ahead

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

58% of English Riviera businesses reported that their booking levels for February 2014 were looking better than (24%) or the same as (34%) March 2013, compared with 48% of businesses within the region as a whole and 54% within Devon.

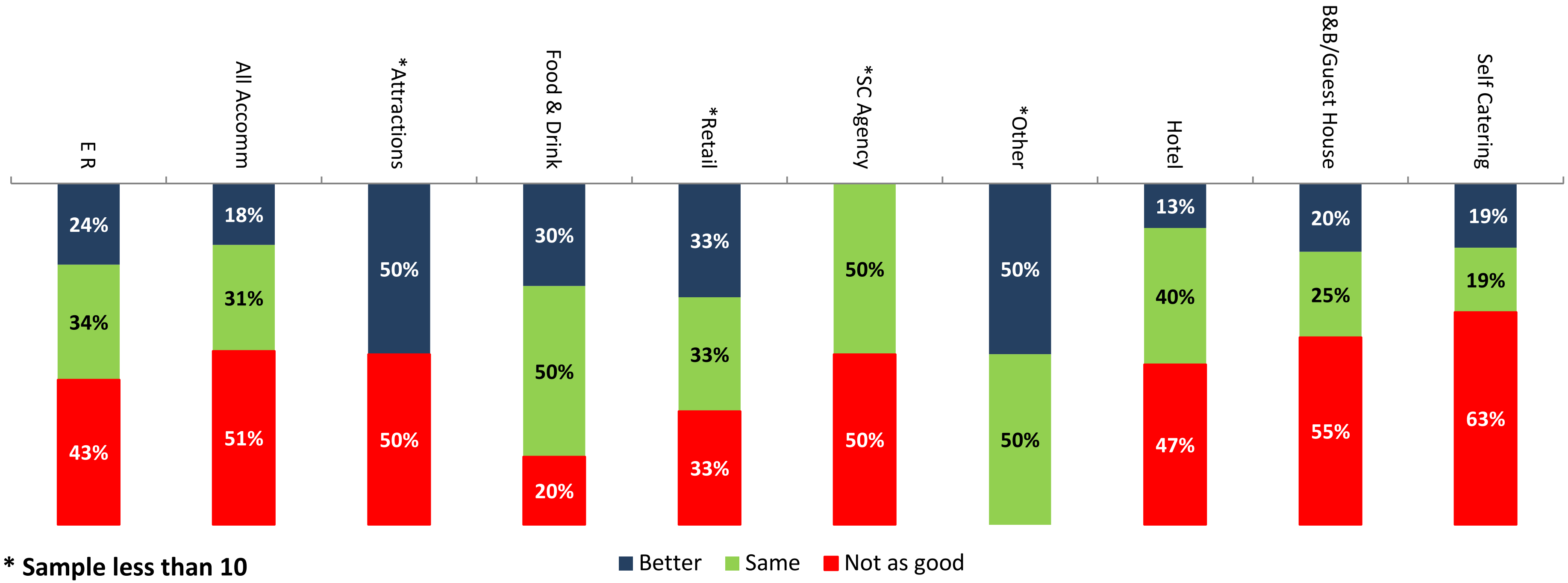


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	24%	19%	-	-	100%	9%	22%	29%	17%	20%	-	67%
The same	34%	29%	50%	-	-	9%	32%	29%	42%	40%	32%	33%
Not as good	43%	53%	50%	-	-	82%	46%	43%	42%	40%	68%	-
Base	68	214	2	-	1	33	94	28	12	5	31	6

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

51% of all accommodation providers were anticipating their booking levels for March 2014 to be worse than the same time last year compared with 20% of food and drink providers. 63% of Self Catering operators and 55% of B&B/Guest Houses were anticipating their booking levels for March 2014 to be worse than the same time last year. In contrast, 53% of Hotels were anticipating their booking levels for March 2014 to be better than (13%) or the same (40%) as March 2013.

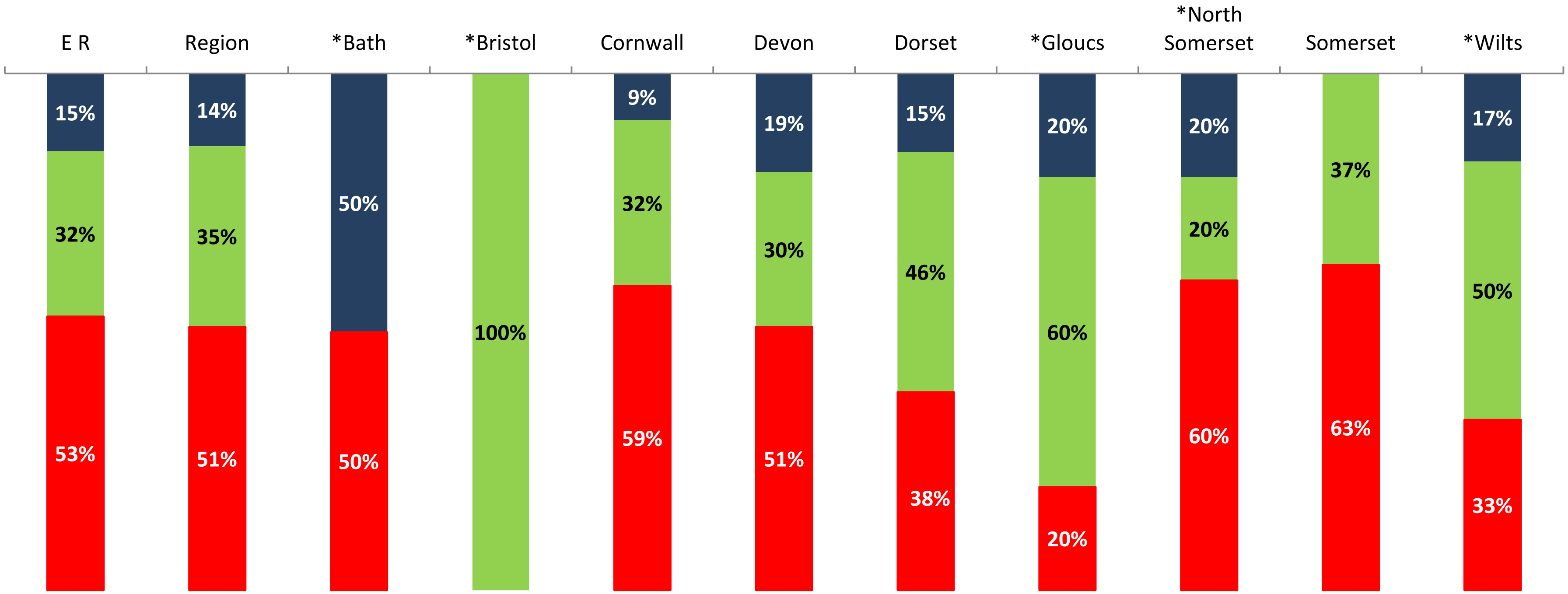


* Sample less than 10

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	24%	18%	50%	-	30%	33%	-	50%	13%	20%	19%	-	-
Same	34%	31%	-	-	50%	33%	50%	50%	40%	25%	19%	-	-
Not as good	43%	51%	50%	-	20%	33%	50%	-	47%	55%	63%	-	-
Base	68	45	<5	-	10	<5	<5	<5	15	20	16	-	-

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

53% of English Riviera businesses reported that their booking levels for Easter 2014 were looking worse than Easter 2013, compared with 51% of businesses within the region as a whole and within Devon respectively.

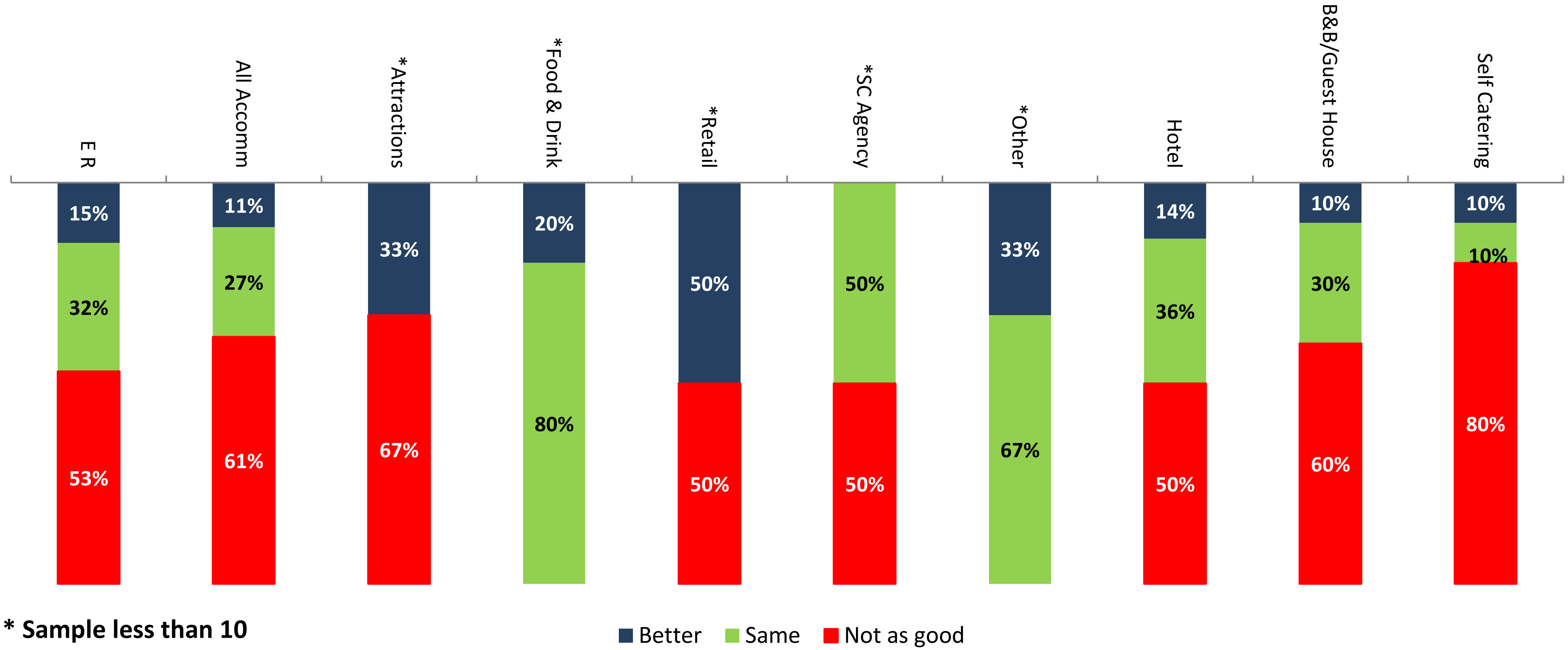


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	15%	14%	50%	-	-	9%	19%	15%	20%	20%	-	17%
The same	32%	35%	-	-	100%	32%	30%	46%	60%	20%	37%	50%
Not as good	53%	51%	50%	-	-	59%	51%	38%	20%	60%	63%	33%
Base	59	200	2	-	1	34	84	26	10	5	30	6

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

61% of all accommodation providers were anticipating their booking levels for Easter 2014 to be worse than Easter 2013, including 80% of Self Catering operators, 60% of B&B/Guest Houses and half of all 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	15%	11%	33%	-	20%	50%	-	33%	14%	10%	10%	-	-
Same	32%	27%	-	-	80%	-	50%	67%	36%	30%	10%	-	-
Not as good	53%	61%	67%	-	-	50%	50%	-	50%	60%	80%	-	-
Base	59	44	<5	-	5	<5	<5	<5	14	20	10	-	-

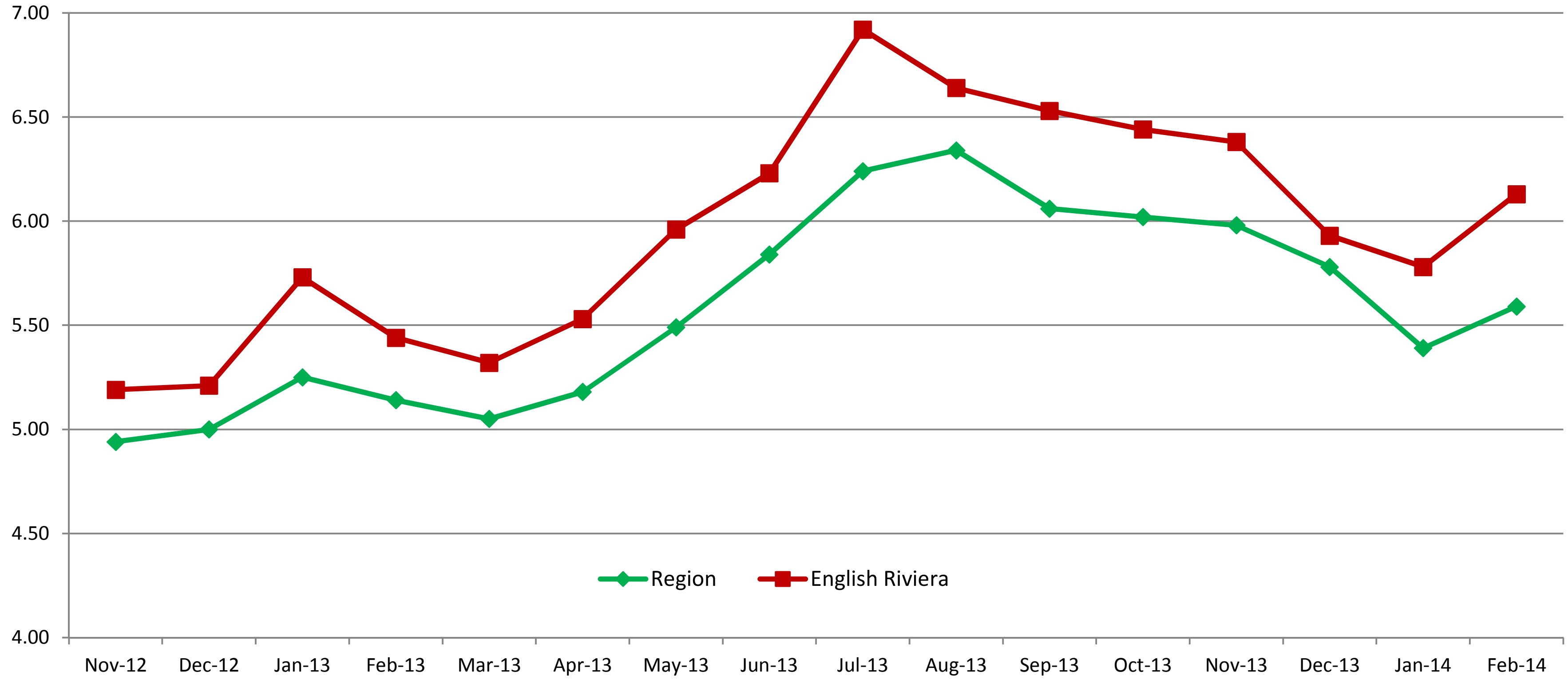
English Riviera Tourism Monitor

February 2014

Business Optimism

Business Optimism

Businesses on the English Riviera recorded an optimism score of 6.13 for February 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. This is higher than the optimism score recorded last month and remains higher than the South West regional score for February 2014 of 5.59.



Optimism	Nov-12	Dec-12	Jan-13	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
English Riviera	5.19	5.21	5.73	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
Region	4.94	5.00	5.25	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

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 45% of all respondents provided additional comments this month with the exceptionally poor weather/flooding featuring most heavily again this month.

The telephone does not seem to be ringing as much as in the past and bookings for June are down on previous seasons. We feel that this may be due to the negative publicity regarding the storm damage and the repair to the rail link at Dawlish.

Media haven't done us in the South West any favours over the winter period.

The weather has had a terrible impact and I know I had two bookings cancelled for Feb/March. The ERTC have been doing an amazing job on our behalf - many thanks to them.

We are all hoping for a hot summer so the Bay will be full again.

Press reporting of adverse weather directly effects on public confidence in choosing the South West as a holiday destination.

There is a significant level of price competition together with a reduced market.

The closure of the railway line at Dawlish has had quite an impact resulting in cancelled bookings.

The sun brings the visitors down to the English Riviera - plain and simple!

Feedback suggests people thought that the area may be flooded. People are also more savvy in looking for last minute deals and discounts now.

A major downside of the internet is that people can monitor the weather and our availability in real time and make a more informed, last minute, judgement on if and when to book. Forward bookings have almost become a thing of the past.

Business Optimism

People have to want to come to the bay area, no matter what I do, if they don't want to come because of poor shops, facilities, expensive parking and poor food outlets there is nothing I can do. The Council and individual businesses need to ensure we are the best in all we do and we need to be much more entrepreneurial in our outlook for the bay.

More than ever the success or failure of this year will come down to the weather. If the sun shines at Easter and during the May bank holidays things will be OK.

My business is a destination point and sell rather expensive items so this may have something to do with it. We are seeing many new tourists arrive everyday and also many people return for years as I found in my old premises.

Road works and closure of main roads in area effects footfall/turnover

Reduced parking still an issue. Council doesn't react to improve.

Media coverage relating to the floods and the weather generally have had a negative impact. Advance bookings in February literally dropped off a cliff for approx. 3 weeks. Current weather is having positive impact. The number of closures on Brixham high street will ultimately have a negative impact on tourist perception of the town.

Floods on Somerset Levels, rail breakdown at Dawlish, irrespective of the 'open for business' announcement, the impression is of 'disaster' in the West

I have never seen such a litter and dog poo infested town as Torquay. Torbay Council should be ashamed of itself at having such a filthy town. What sort of impression does it give to visitors? Needs cleaning up urgently.

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

The South West Research Company