English Riviera Tourism Monitor

March 2014

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

May 2014

Executive Summary

Compared to March 2013 businesses reported that:

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

Increased 28% / Stayed the same 26% / Decreased 46%

Estimated actual change in visitors -6.7%

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

Increased 26% / Stayed the same 26% / Decreased 47%

Estimated actual change in turnover -5.3%

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

Higher 21% / Stayed the same 40% / Decreased 39%

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

Better 39% / Same as last year 24% / Not as good 37%

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

Better 32% / Same as last year 29% / Not as good 39%

<u>Optimism</u>

Optimism score is 5.98 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

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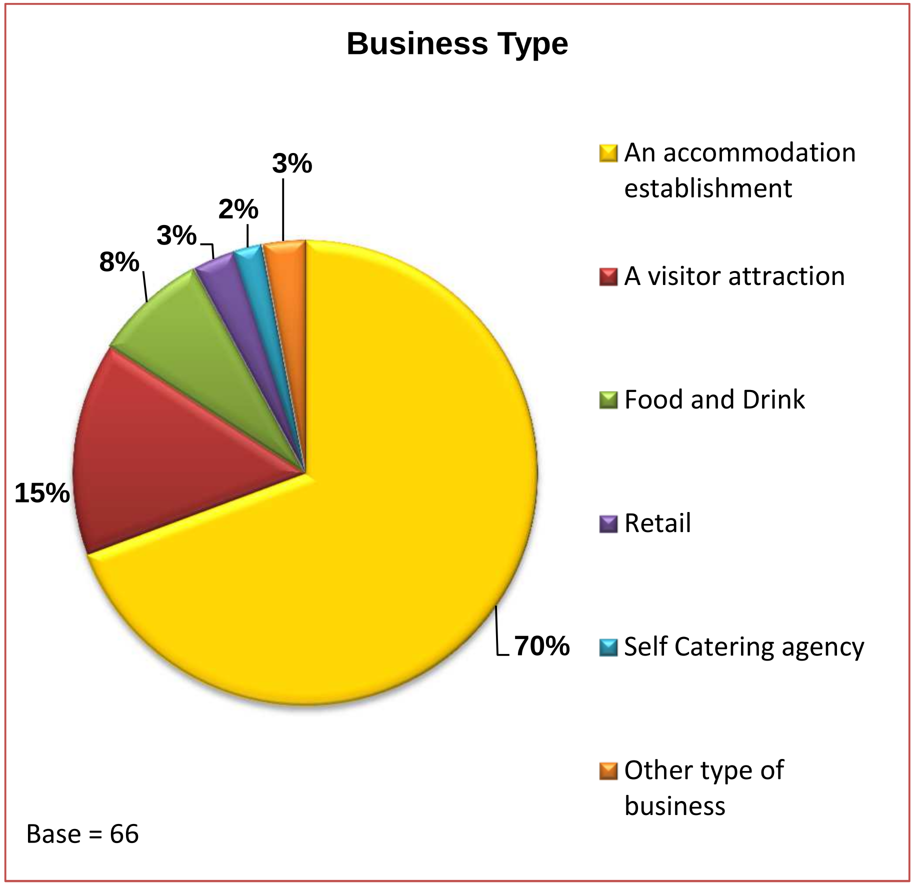
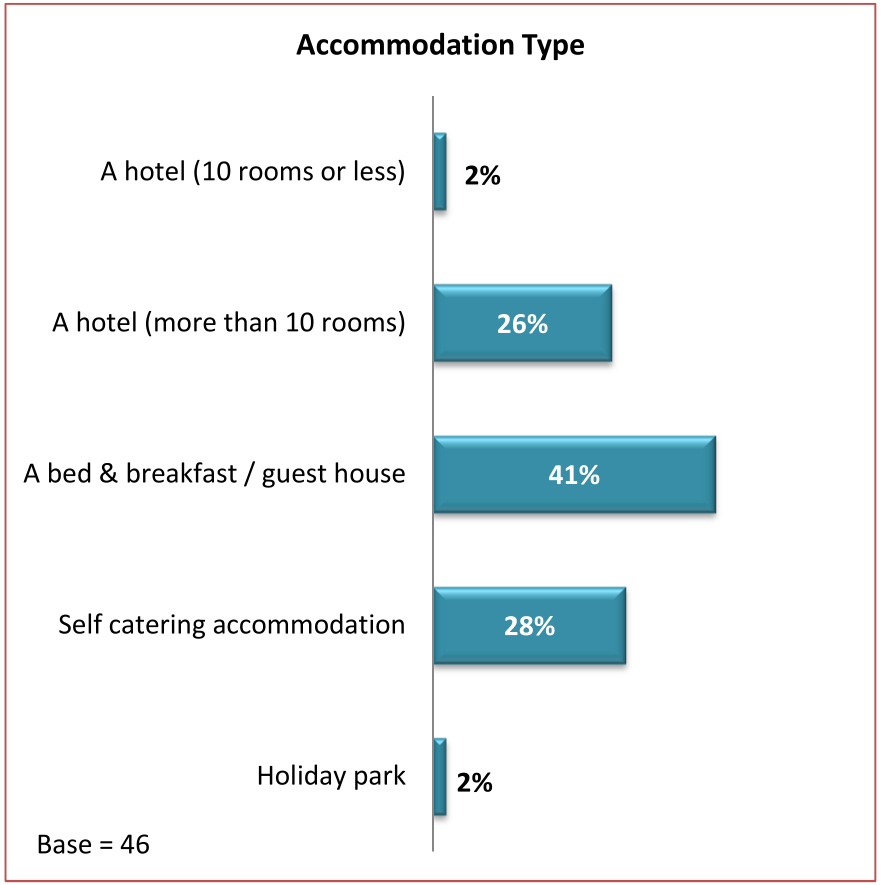
Sample Profile

Business Type

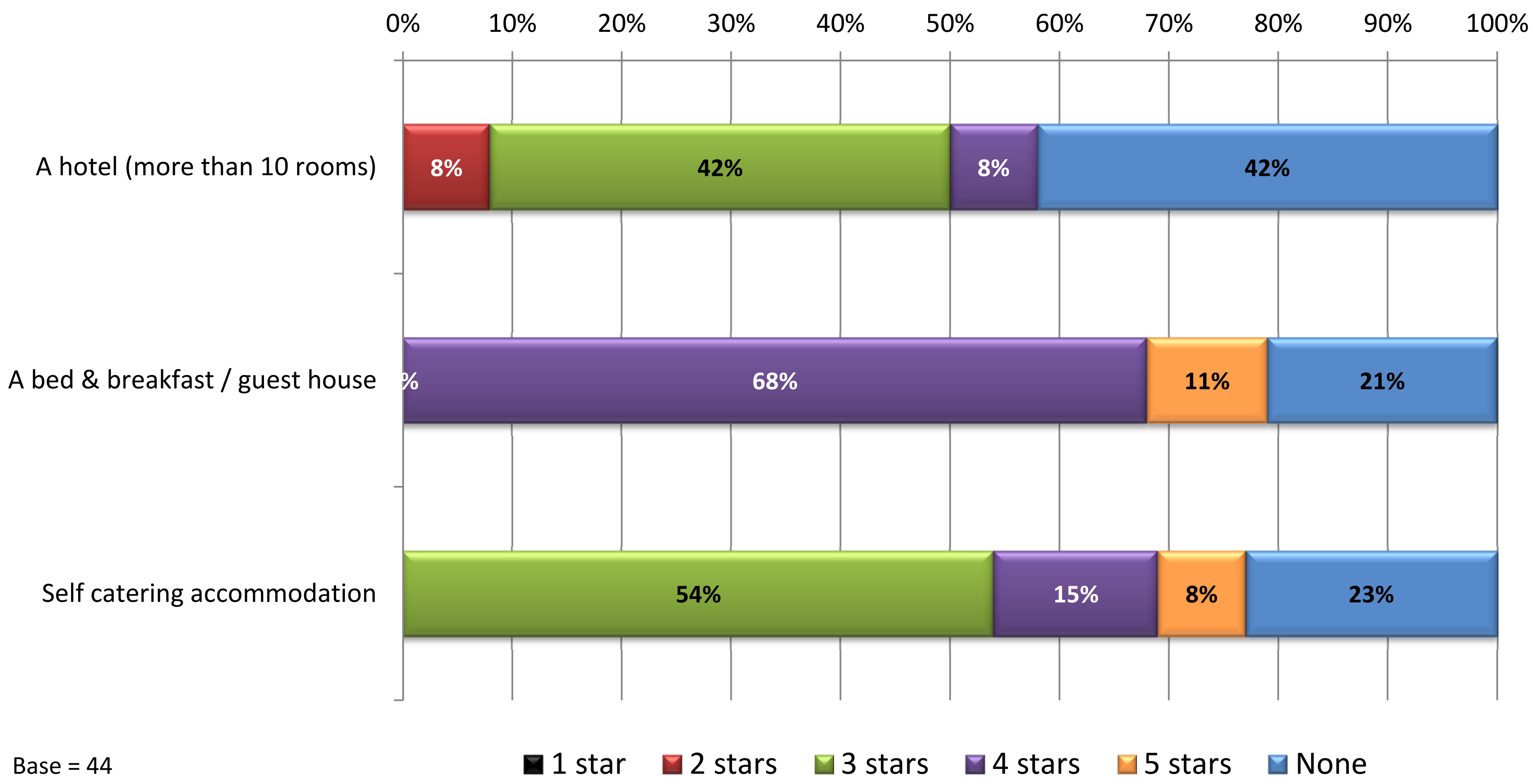




Accommodation providers account for 70% of responses, Visitor Attractions 15% and Food & Drink establishments 8%.

Serviced accommodation providers account for 69% of accommodation responses.

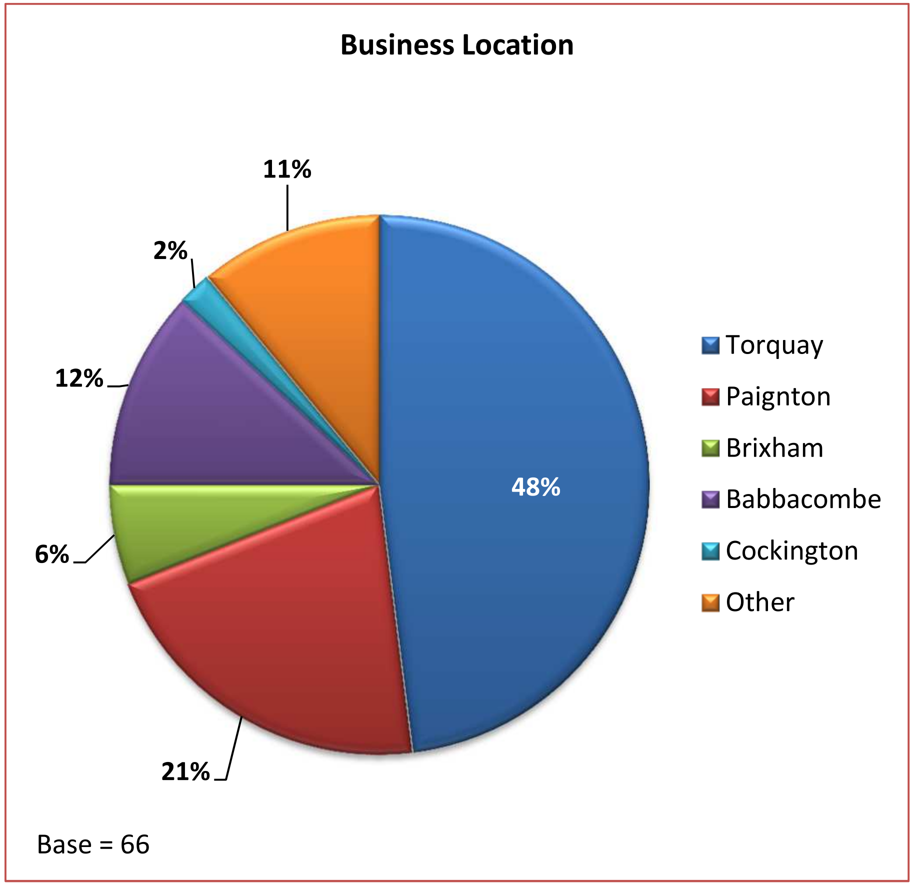
Accommodation Type and Rating

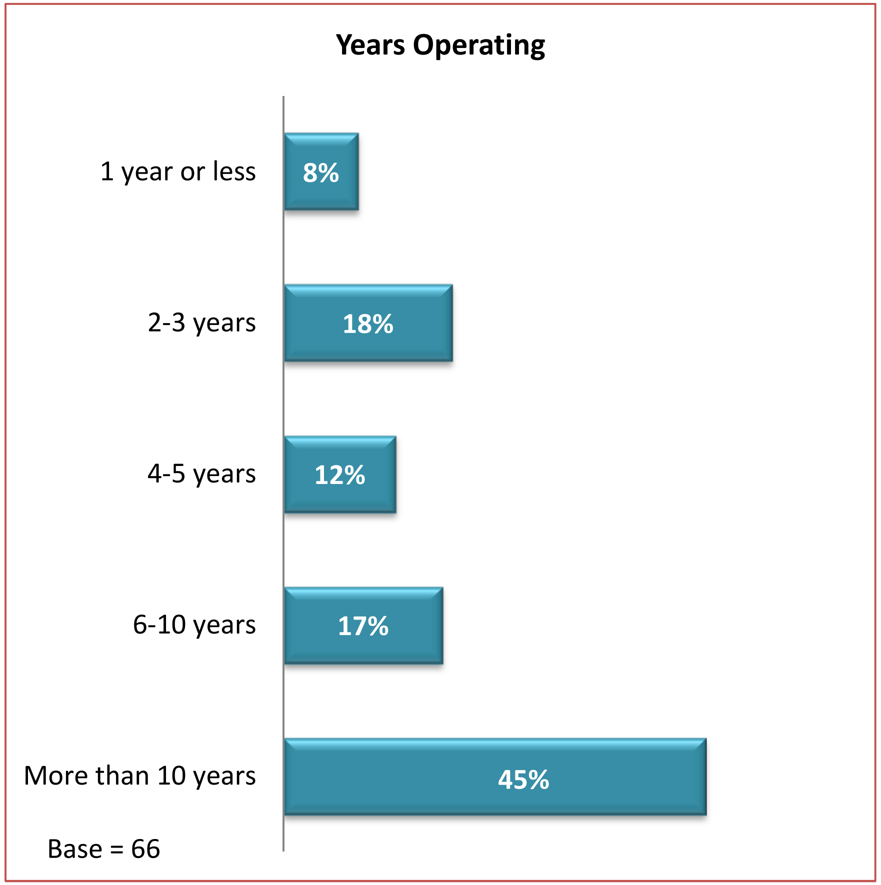


Base = 44

The majority of businesses responding to this survey have a quality rating, although 42% of Hotels with more than 10 rooms, 23% of Self Catering accommodation providers and 32% of B&B/Guest Houses and are not graded.

Business Location and Years Operating





Torquay businesses account for 48% of responses with 21% from Paignton. A further 12% of businesses were from Babbacombe, 6% from Brixham and 2% from Cockington. 11% of businesses were based elsewhere in the resort.

62% of businesses have been operating for more than 6 years.

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March 2014

The Month in Context

March 2014 – The Month in Context

The UK Weather

The month opened with a few days of unsettled weather, but by mid-month high pressure dominated and the country saw a welcome respite to the rain and wind that had defined the preceding winter season. However, dense - and in some places persistent - fog were a problem at times. Some fine and at times warm weather was enjoyed by many, heralding the first spell of more than one or two dry days together since early December. Often sunshine was plentiful, giving rise to some warm days, although nights remained chilly in places. Somewhat more unsettled weather returned later in the month.

The temperature for the month overall was 1.2 °C above the 1981-2010 average. Warm sunny days led to daytime maximum temperatures 2.0 °C above average, and these were particularly high in the east, with Suffolk and Kent having their 2nd highest March maximum temperatures in a series from 1910. In contrast night time minimum temperatures were closer to average. Rainfall was 77% of average, and East Anglia had less than half of average. It was a sunny month everywhere, with 134% of average hours of bright sunshine. A maximum temperature of 20.9 °C was recorded at St James's Park (Greater London) and Santon Downham (Suffolk) on the 30th.

Weather impacts

Although there were spells of fine early spring weather, there were also incidences of dense fog during the month. This caused some travel disruption on roads, with a number of accidents reported across parts of the South West, particularly Somerset on 13th, and flights were delayed at airports across the country.

Source: Met Office

March 2014 – The Month in Context

The UK economy

The UK economy is still growing strongly, but not at the pace seen in recent months, the Confederation of British Industry (CBI) says.

The group said its growth indicator for March showed the economy growing at its slowest rate in eight months. But the CBI said growth remains above average, as the recovery in the UK economy continues to do well. It added the outlook for the next three months was positive, with the service sector expected to boost GDP.

The CBI based its findings on a survey of 622 manufacturing, retail and service businesses. It found the slowdown in output growth was largely due to the retail, business and consumer and professional services sectors. Growth pick up Anna Leach, CBI's head of economic analysis, said: "Although growth has slowed from record levels last month, it remains strong and firms are optimistic it will pick up again in the next quarter. "As this year progresses, we expect further increases in business and consumer confidence. Productivity and earnings should also start to recover. However, global developments continue to pose a risk to UK growth, not least the risk of renewed problems in the eurozone.“

Meanwhile, a survey of 8,737 small businesses carried out at the end of last year has indicated that Britain's small businesses are feeling increasingly confident. Two-thirds of the firms polled by the Federation of Small Businesses (FSB) said they were planning to expand in the next 12 months. FSB members aged 35 or under also reported increased profits, with 43% saying they had seen growth in 2013.

Source: The BBC

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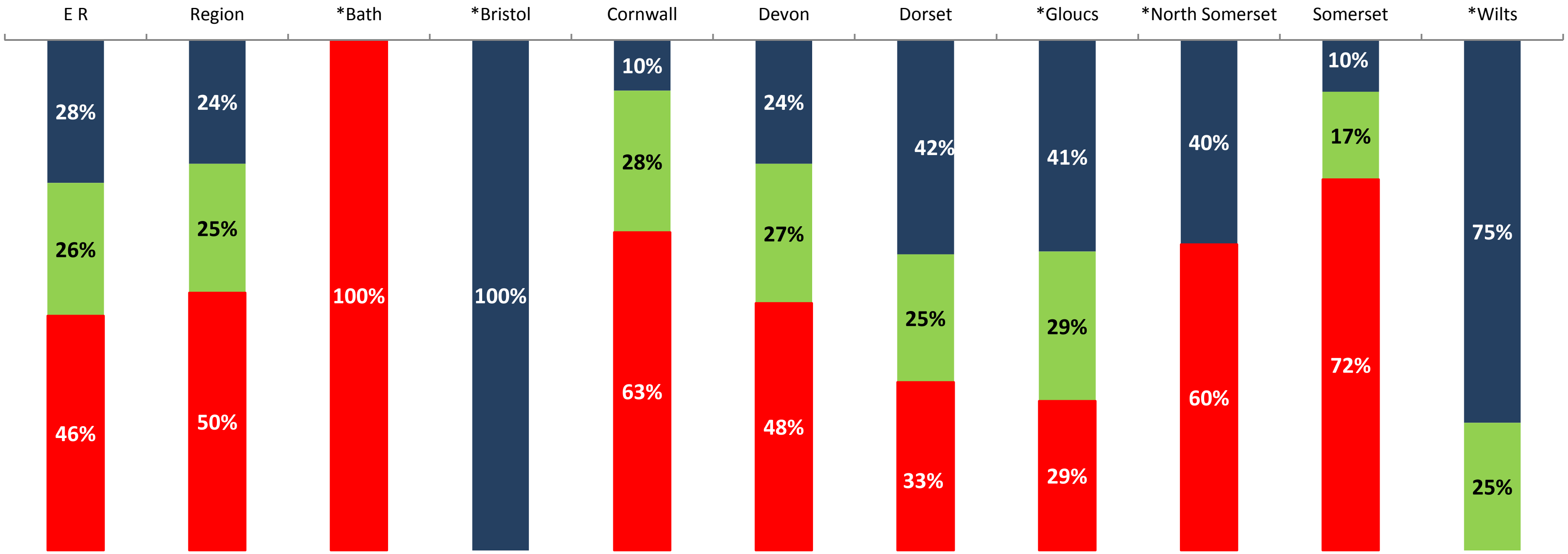
Performance

Performance – Visitor Numbers (2014-2013)

54% of English Riviera businesses reported that their visitor numbers had increased (28%) or remained level (26%) compared with March 2013 – a slightly higher proportion when compared with the region as a whole during the same period (49%). 46% of businesses indicated that their visitor numbers had decreased compared with the same time last year (50% regionally).



*** Sample less than 20**

Visitor numbers	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	28%	24%	-	-	100%	10%	24%	42%	41%	40%	10%	75%
Stayed the same	26%	25%	-	-	-	28%	27%	25%	29%	-	17%	25%
Decreased	46%	50%	100%	-	-	63%	48%	33%	29%	60%	72%	-
Base	61	218	<5	-	<5	40	95	24	17	5	29	<5

Performance – Estimated occupancy levels March 2014

The slides to follow show the estimated occupancy for March 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	56.90%	26
All hotels	61.01%	11
Hotel 10 rooms or less	0.00%	0
Hotel more than 10 rooms	61.01%	11
B&B	24.60%	7
Guest House	18.88%	8
Torquay	63.22%	14
Paignton	46.09%	6
Brixham	60.91%	<5
Babbacombe	40.71%	<5
**Cockington	0.00%	0
Other English Riviera	0.00%	0
Devon	54.86%	35
South West	57.12%	69

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

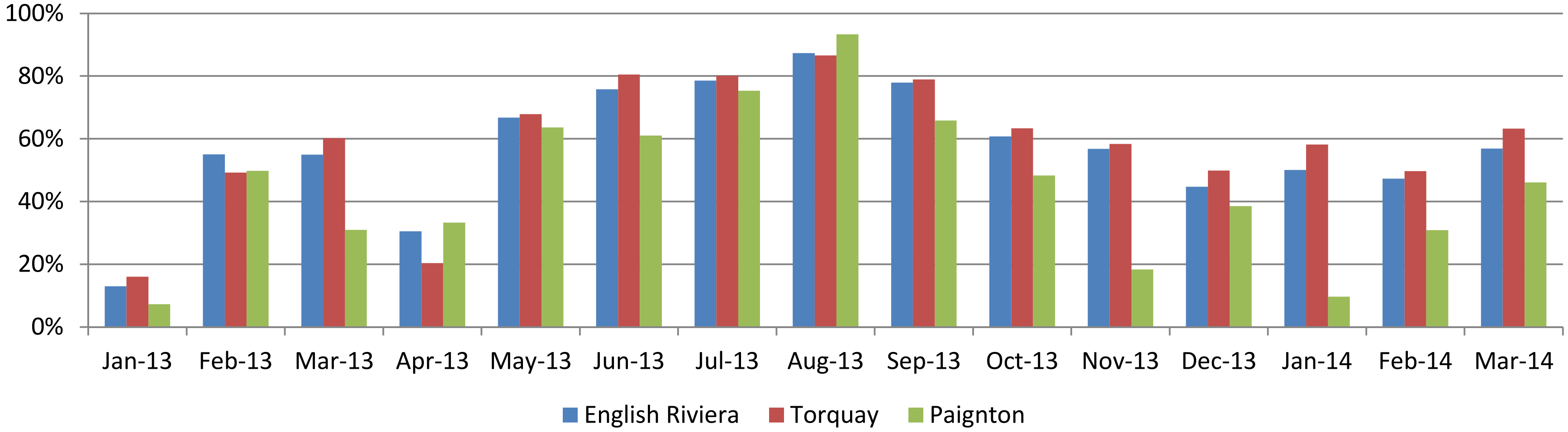
English Riviera serviced room occupancy was calculated at 56.90% for March 2014 compared with an average of 57.12% for the South West region as a whole during the same period.

Self-catering unit occupancy for the English Riviera for March 2014 was calculated at 28.98% compared with 30.19% for the region as a whole.

ERTM SELF-CATERING UNIT OCCUPANCY

Feb-14	% UNIT OCC	SAMPLE
English Riviera	28.98%	13
Self-catering accommodation	28.98%	13
Holiday Park	0.00%	0
Torquay	15.00%	5
Paignton	41.09%	5
Brixham	32.26%	<5
Babbacombe	43.55%	<5
Cockington	0.00%	0
Other English Riviera	9.14%	<5
Devon	33.21%	23
South West	30.19%	61

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	Mar-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%	56.90%
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%	63.22%
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%	46.09%
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 March 2014 English Riviera serviced occupancy was higher than Cornwall, Devon and Somerset.

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, February and March 2014.

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14
South West	46.15%	47.12%	57.12%
BANES	*	*	
Bristol	*	*	*
Cornwall	*	36.61%	48.59%
Devon	47.35%	44.94%	54.86%
English Riviera	**50.07%**	**47.32%**	**56.90%**
Dorset	54.58%	27.23%	*
Gloucestershire	*	*	77.59%
Somerset	32.48%	46.42%	37.22%
Wiltshire	56.85%	59.82%	*

*** Sample size less than 5**

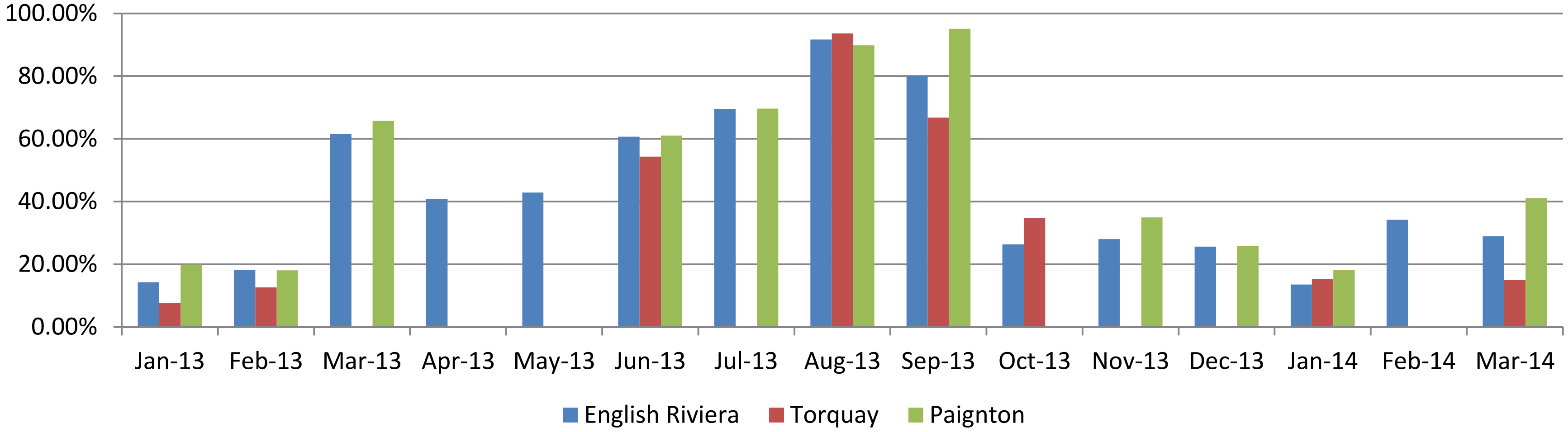
Performance – Estimated serviced accommodation occupancy levels 2014 by type

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, February and March 2014.

SERVICED ROOM OCCUPANCY	Jan-14	Feb-14	Mar-14
All ER hotels	**55.42%**	**52.05%**	**61.01%**
All SW hotels	50.76%	51.93%	62.15%
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%**	**61.01%**
SW Hotel more than 10 rooms	52.93%	56.10%	62.54%
ER B&B/Guest House	**8.34%**	**17.56%**	**20.79%**
SW B&B/Guest House	23.00%	26.78%	23.34%

*** 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	Mar-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%	28.98%
Torquay	7.76%	12.64%	*	*	*	54.34%	*	93.62%	66.74%	34.79%	*	*	*	15.30%	*	15.00%
Paignton	19.86%	18.06%	65.76%	*	*	61.05%	69.66%	89.78%	95.12%	*	34.90%	25.76%	*	18.22%	*	41.09%
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 March 2014 English Riviera self-catering unit occupancy was higher than Dorset and Somerset.

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	Mar-14
South West	16.89%	12.88%	30.19%
BANES	*	*	*
Bristol	*	*	*
Cornwall	15.25%	12.77%	36.89%
Devon	12.76%	35.44%	33.21%
English Riviera	**13.52%**	**34.23%**	**28.98%**
Dorset	19.71%	7.40%	13.98%
Gloucestershire	*	7.06%	*
Somerset	19.23%	4.88%	17.89%
Wiltshire	*	0.00%	*

*** Sample size less than 5**

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

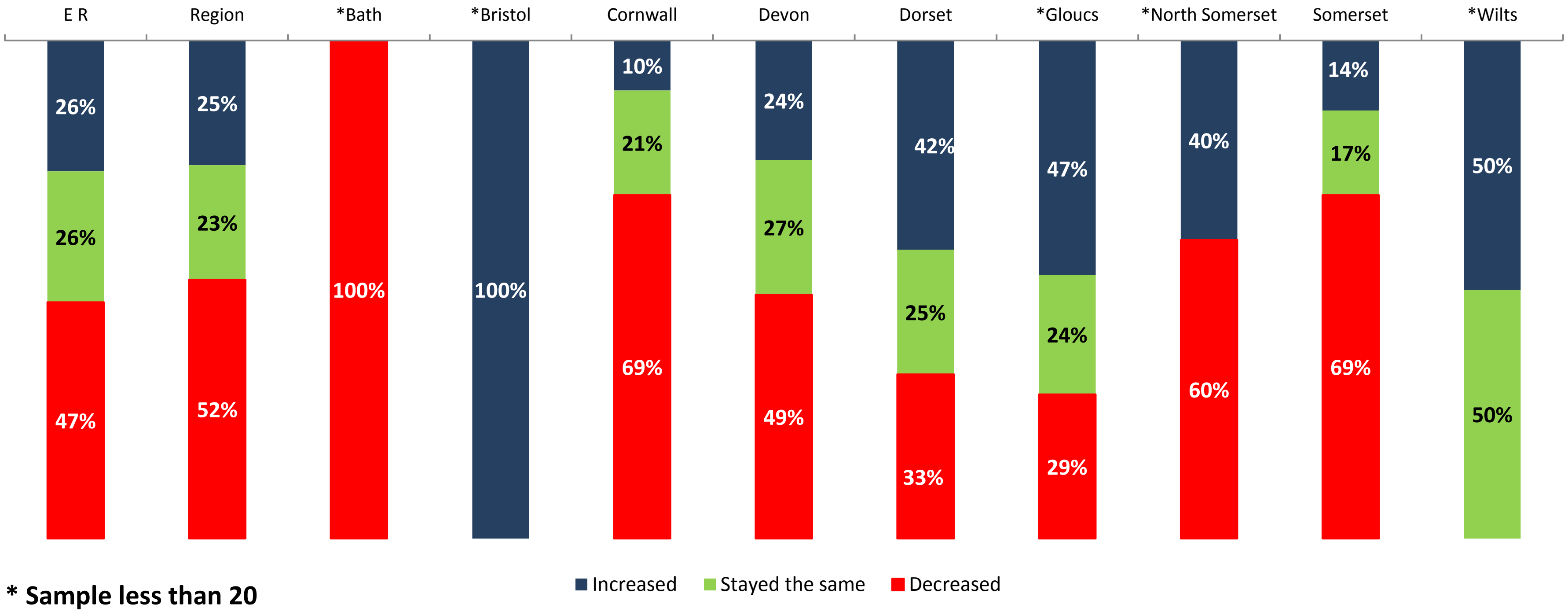
Key comparisons;
All ER Self-catering – Higher than the regional average during February 2014.
ER Self-catering (not including Holiday Parks) – Higher than the regional average in February and March 2014.

SELF-CATERING UNIT OCCUPANCY	Jan-14	Feb-14	Mar-14
All ER Self-catering	**13.52%**	**34.23%**	**28.98%**
All SW Self-catering	16.89%	21.04%	30.19%
ER Self-catering	**13.52%**	**34.23%**	**28.98%**
SW Self-catering	16.89%	21.04%	26.18%
ER Holiday Park	*	*	*
SW Holiday Park	*	*	32.47%

*** Sample size less than 5**

Performance – Turnover (2014-2013)

52% of English Riviera businesses reported increased or level turnover (26% in each case) during March 2014 compared with March 2013, a slightly higher proportion when compared with the region as a whole during the same period (48%). 47% of English Riviera businesses reported decreased turnover during March 2014 compared with 52% of businesses for the region as a whole.



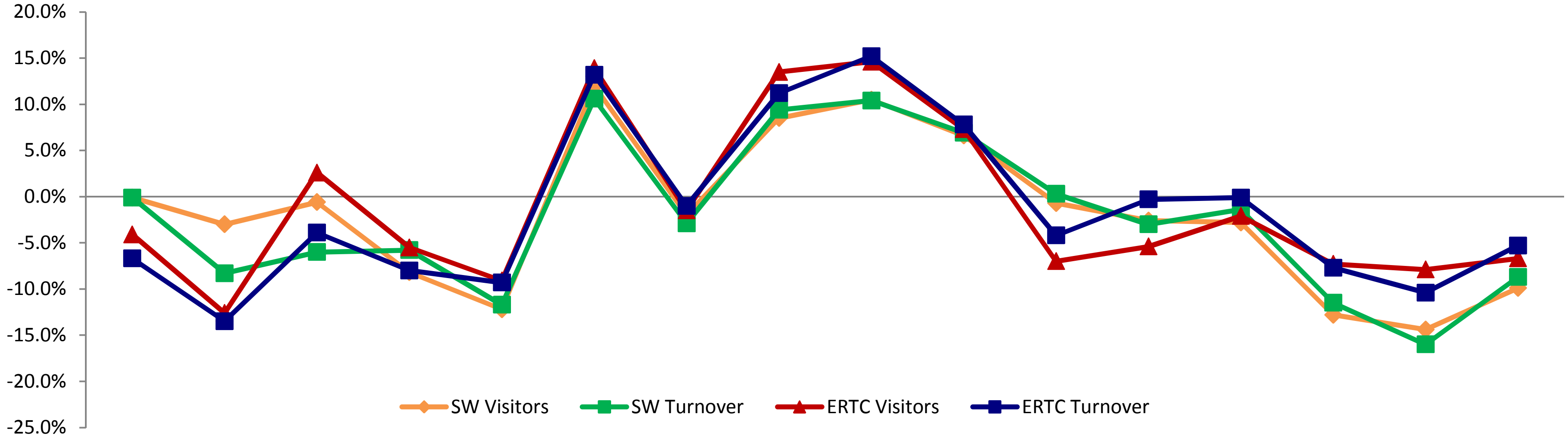
*** Sample less than 20**

Turnover	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Increased	26%	25%	-	-	100%	10%	24%	42%	47%	40%	14%	50%
Stayed the same	26%	23%	-	-	-	21%	27%	25%	24%	-	17%	50%
Decreased	47%	52%	100%	-	-	69%	49%	33%	29%	60%	69%	-
Base	57	211	<5	-	<5	39	89	24	17	5	29	<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 March 2014 English Riviera businesses reported decreases of -6.7% in terms of visitors and -5.3% in terms of turnover compared with March 2013 and which compares favourably against the regional averages of -9.9% and -8.7% in terms of visitors and turnover during the same period.

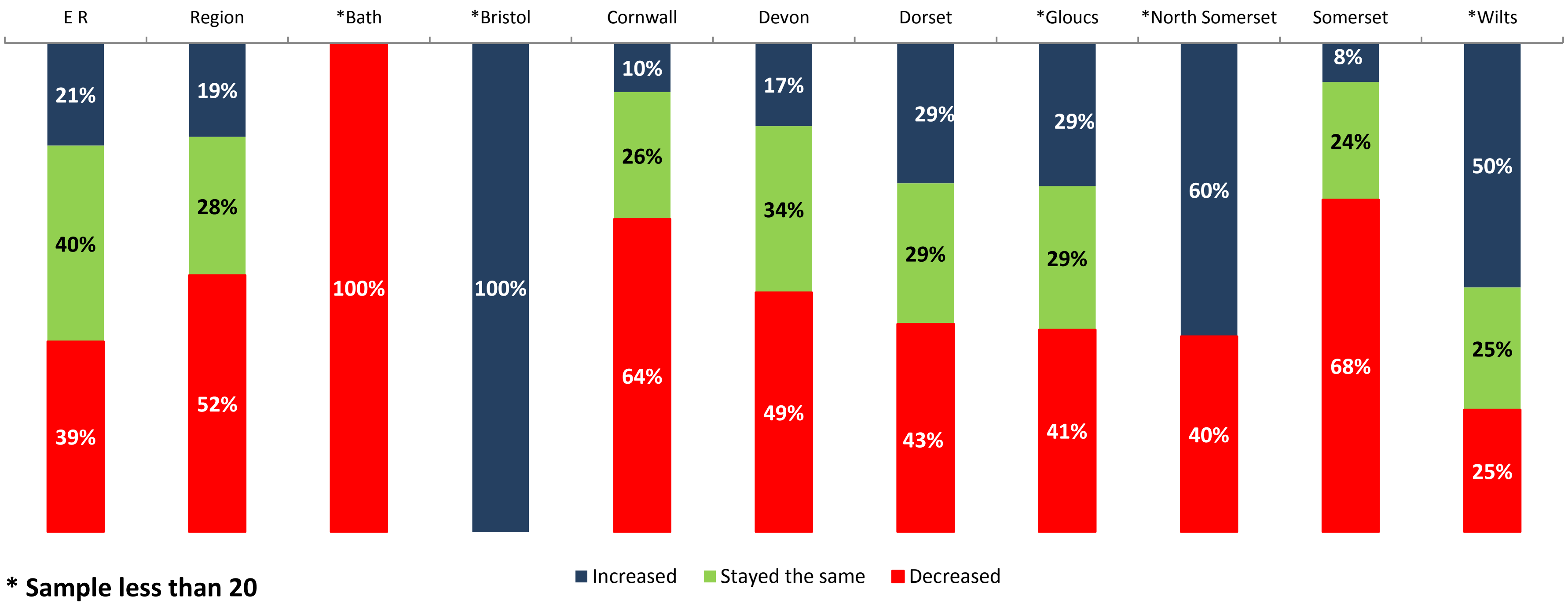
ERTC	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sept-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14
Visitors	-4.1%	-12.6%	2.6%	-5.5%	-9.1%	13.9%	-1.5%	13.5%	14.6%	7.3%	-7.0%	-5.4%	-2.1%	-7.3%	-7.9%	-6.7%
Turnover	-6.7%	-13.5%	-3.9%	-8.0%	-9.3%	13.2%	-1.0%	11.2%	15.2%	7.8%	-4.2%	-0.3%	-0.1%	-7.7%	-10.4%	-5.3%



Region	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	Mar-14
Visitors	-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%	-9.9%
Turnover	-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%	-8.7%

Performance – Profitability (2014-2013)

61% of all English Riviera businesses reported increased (21%) or level profitability (40%) for the month, compared with 47% of businesses in the SW region as a whole during the same period. 39% of businesses reported theirs as being lower than during March 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	21%	19%	-	-	100%	10%	17%	29%	29%	60%	8%	50%
Stayed the same	40%	28%	-	-	-	26%	34%	29%	29%	-	24%	25%
Decreased	39%	52%	100%	-	-	64%	49%	43%	41%	40%	68%	25%
Base	57	204	<5	-	<5	39	89	21	17	5	25	<5

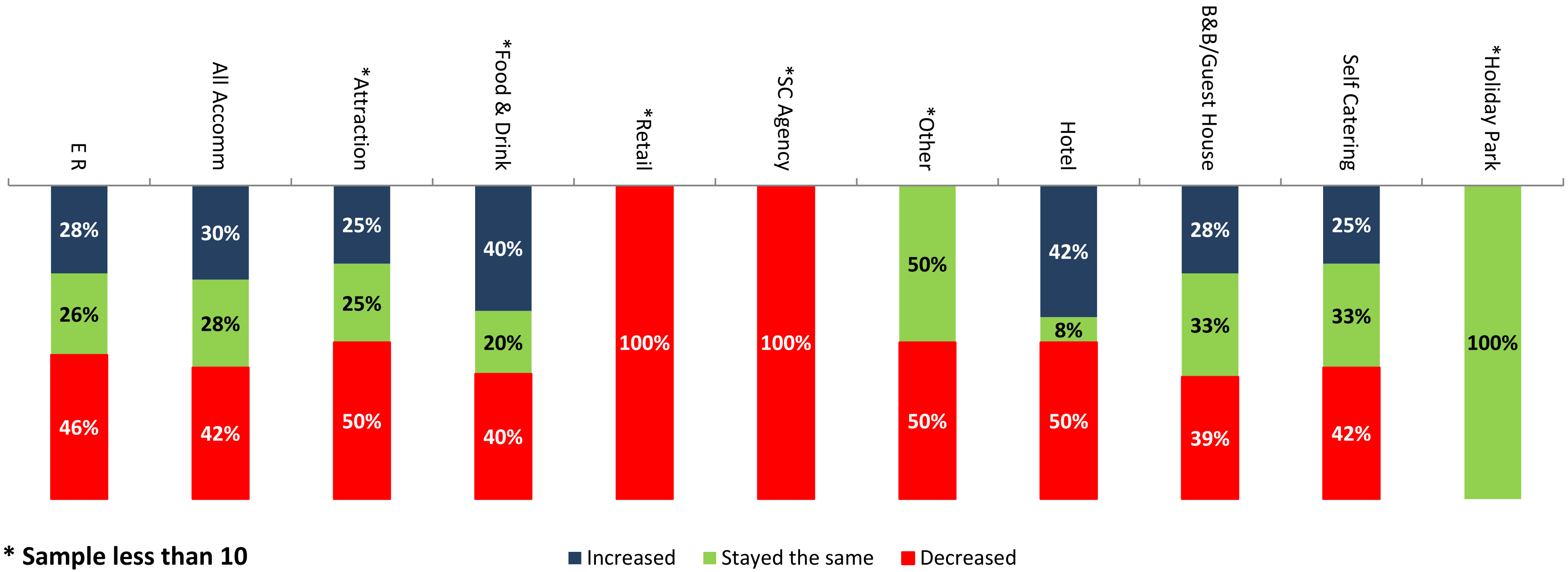
English Riviera Tourism Monitor

March 2014

Business Type Performance

Business Type Performance – Visitor numbers (2014-2013)

58% of all accommodation providers reported increased (30%) or level (28%) visitor numbers for March 2014. 61% of B&B/Guest Houses, 58% of Self Catering operators and 50% of Hotels reported increased or level visitor numbers for March 2014 compared with the same time last year. However, the remaining half of all Hotels reported decreased visitor numbers compared with the same time last year.

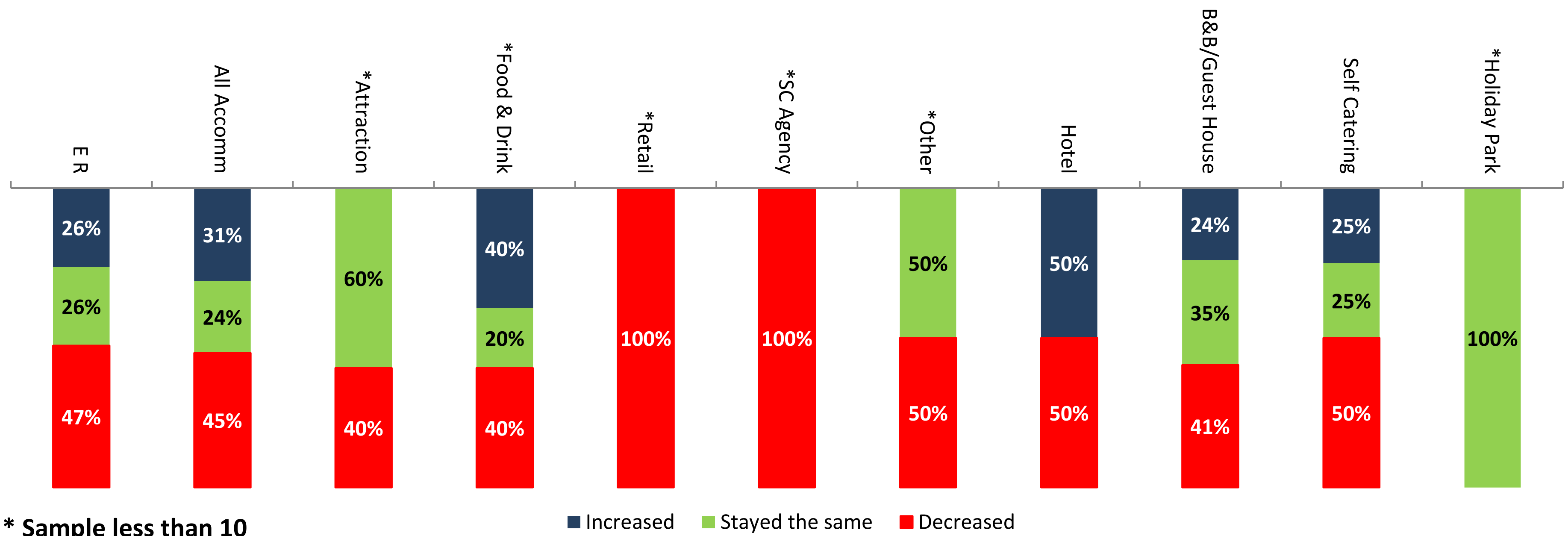


*** Sample less than 10**

Visitor numbers	ER	Accomm	*Attraction	*Sports/ Activities	*Food & Drink	*Retail	*Travel/ Transport	*SC Agency	*Other	Hotel	B&B/ Guest House	Self Catering	*Holiday Park	*Caravan/ campsite
Increased	28%	30%	25%	-	40%	-	-	-	-	42%	28%	25%	-	-
Stayed the same	26%	28%	25%	-	20%	-	-	-	50%	8%	33%	33%	100%	-
Decreased	46%	42%	50%	-	40%	100%	-	100%	50%	50%	39%	42%	-	-
Base	61	43	8	-	5	<5	-	<5	<5	12	18	12	<5	-

Business Type Performance – Turnover (2014-2013)

55% of all accommodation providers reported increased (31%) or level turnover (24%) for March 2014. Half of all Hotels reported increased turnover for March 2014 compared with the same time last year, whilst 59% of B&B/Guest Houses and half of all Self Catering operators reported increased or level turnover for the month compared with March 2013. However, the remaining half of all Hotels and Self Catering operators and 41% of B&B/Guest House operators reported decreased turnover compared with the same time last year.

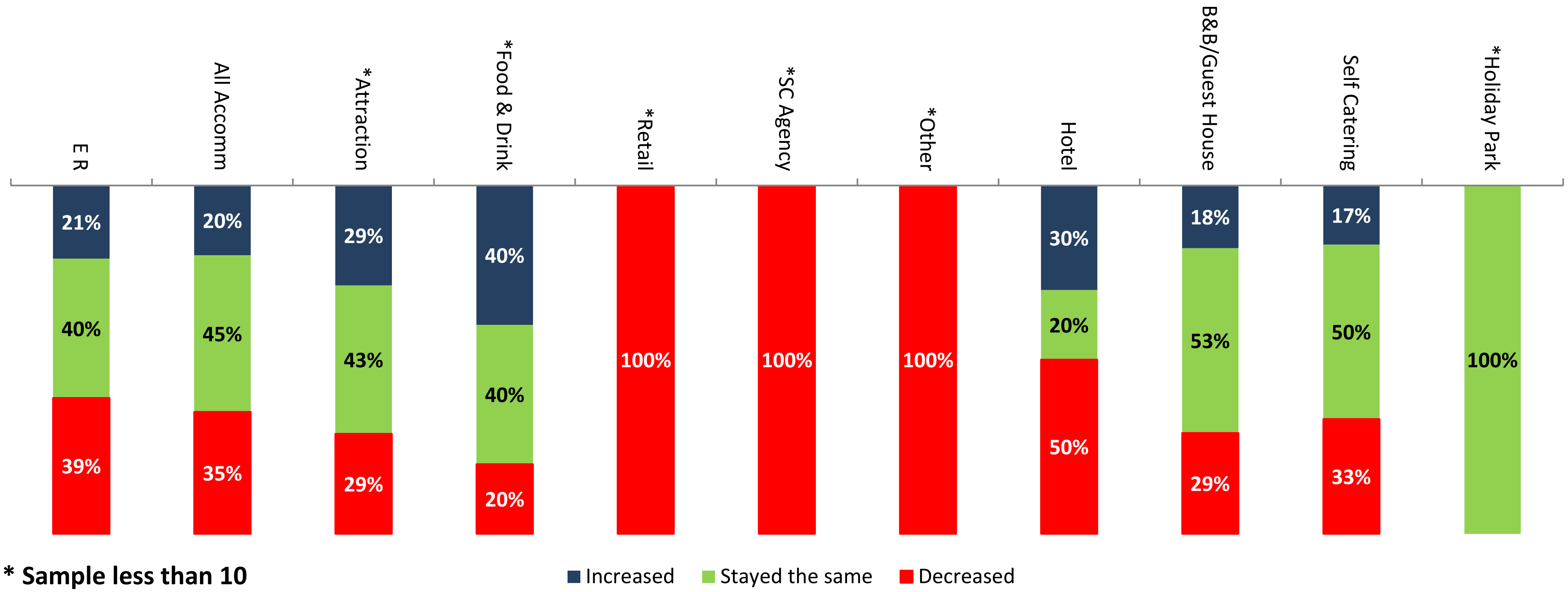


*** Sample less than 10**

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	26%	31%	-	-	40%	-	-	-	-	50%	24%	25%	-	-
Stayed the same	26%	24%	60%	-	20%	-	-	-	50%	-	35%	25%	100%	-
Decreased	47%	45%	40%	-	40%	100%	-	100%	50%	50%	41%	50%	-	-
Base	57	42	5	-	5	<5	-	<5	<5	12	17	12	<5	-

Business Type Performance – Profitability (2014-2013)

65% of all accommodation providers reported increased (20%) or level (45%) profitability for March 2014. 71% of B&B/Guest Houses, 67% of Self Catering operators and half of all Hotels reported increased or level profitability for March 2014 compared with the same time last year. In contrast, 50% of Hotels reported decreased profitability compared with the March 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	21%	20%	29%	-	40%	-	-	-	-	30%	18%	17%	-	-
Stayed the same	40%	45%	43%	-	40%	-	-	-	-	20%	53%	50%	100%	-
Decreased	39%	35%	29%	-	20%	100%	-	100%	100%	50%	29%	33%	-	-
Base	57	40	7	-	5	<5	-	<5	<5	10	17	12	<5	-

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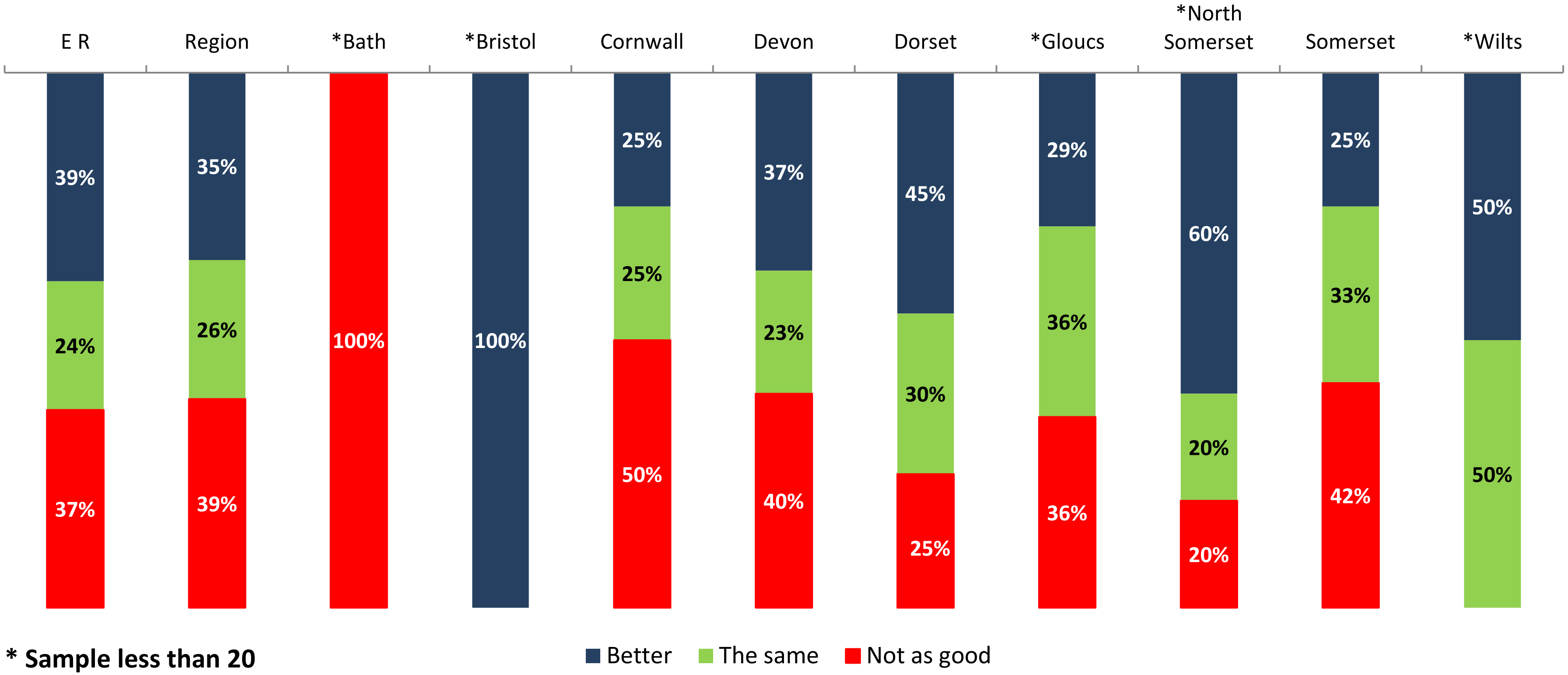
Looking Ahead

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

63% of English Riviera businesses reported that their booking levels for April 2014 were looking better than (39%) or the same as (24%) April 2013, compared with 61% of businesses within the region as a whole and 60% within Devon.

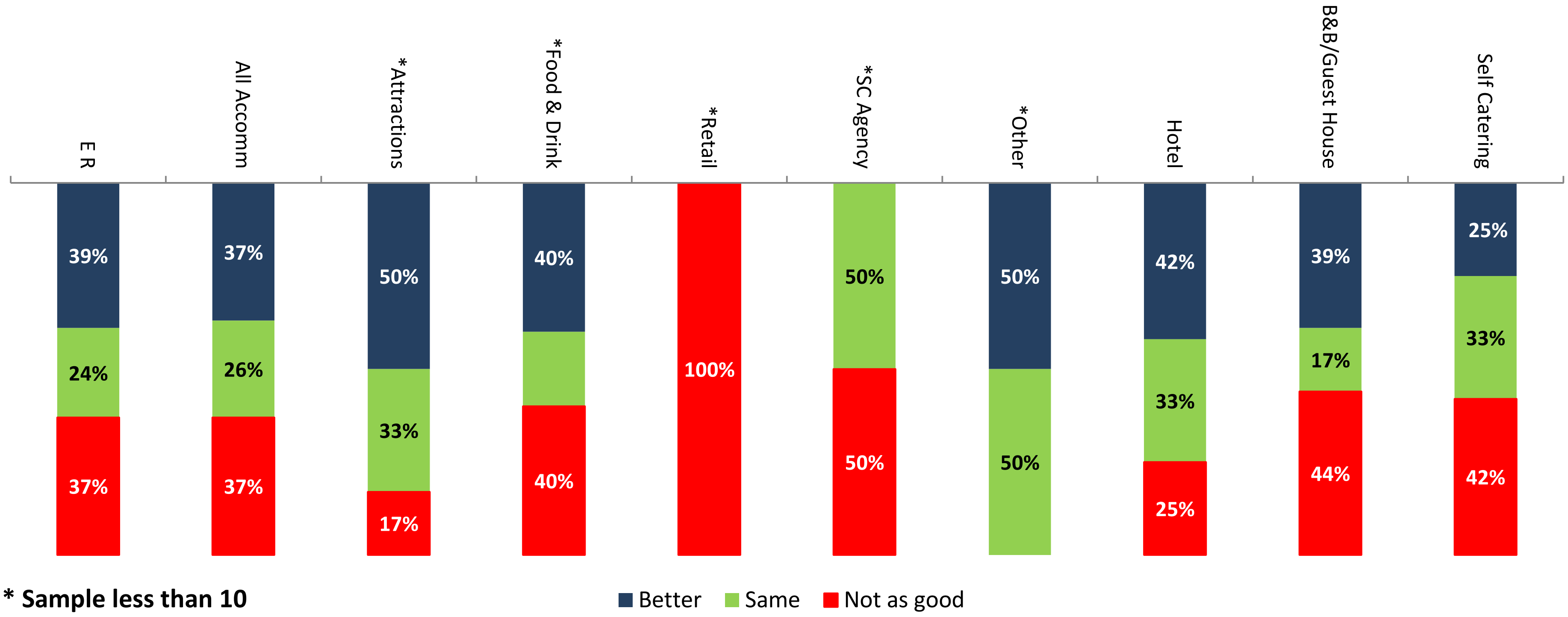


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	39%	35%	-	-	100%	25%	37%	45%	29%	60%	25%	50%
The same	24%	26%	-	-	-	25%	23%	30%	36%	20%	33%	50%
Not as good	37%	39%	100%	-	-	50%	40%	25%	36%	20%	42%	-
Base	59	197	<5	-	<5	40	87	20	14	5	24	<5

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

63% of all accommodation providers were anticipating their booking levels for April 2014 to be better than (37%) or the same (26%) as April 2013. 75% of Hotels, 58% of Self Catering operators and 56% of B&B/Guest Houses were anticipating their booking levels for April 2014 to be better than or the same as April 2013.

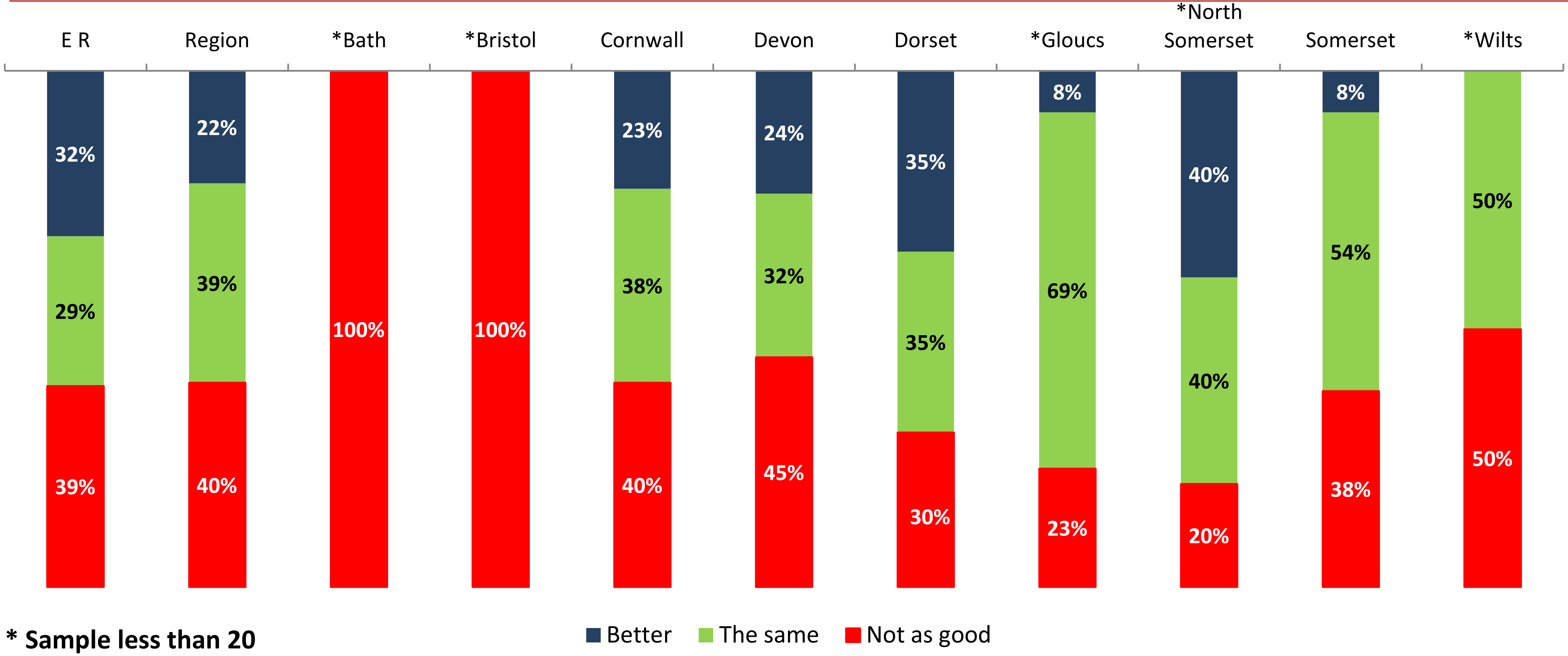


*** Sample less than 10**

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	39%	37%	50%	-	40%	-	-	100%	50%	42%	39%	25%	100%
Same	24%	26%	33%	-	20%	-	-	-	-	33%	17%	33%	-
Not as good	37%	37%	17%	-	40%	100%	-	-	50%	25%	44%	42%	-
Base	59	43	6	-	5	<5	-	<5	<5	12	18	12	<5

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

61% of English Riviera businesses reported that their booking levels for Easter 2014 were looking better than (32%) or the same as (29%) Easter 2013, compared with 61% of businesses within the region as a whole and 56% within Devon respectively.

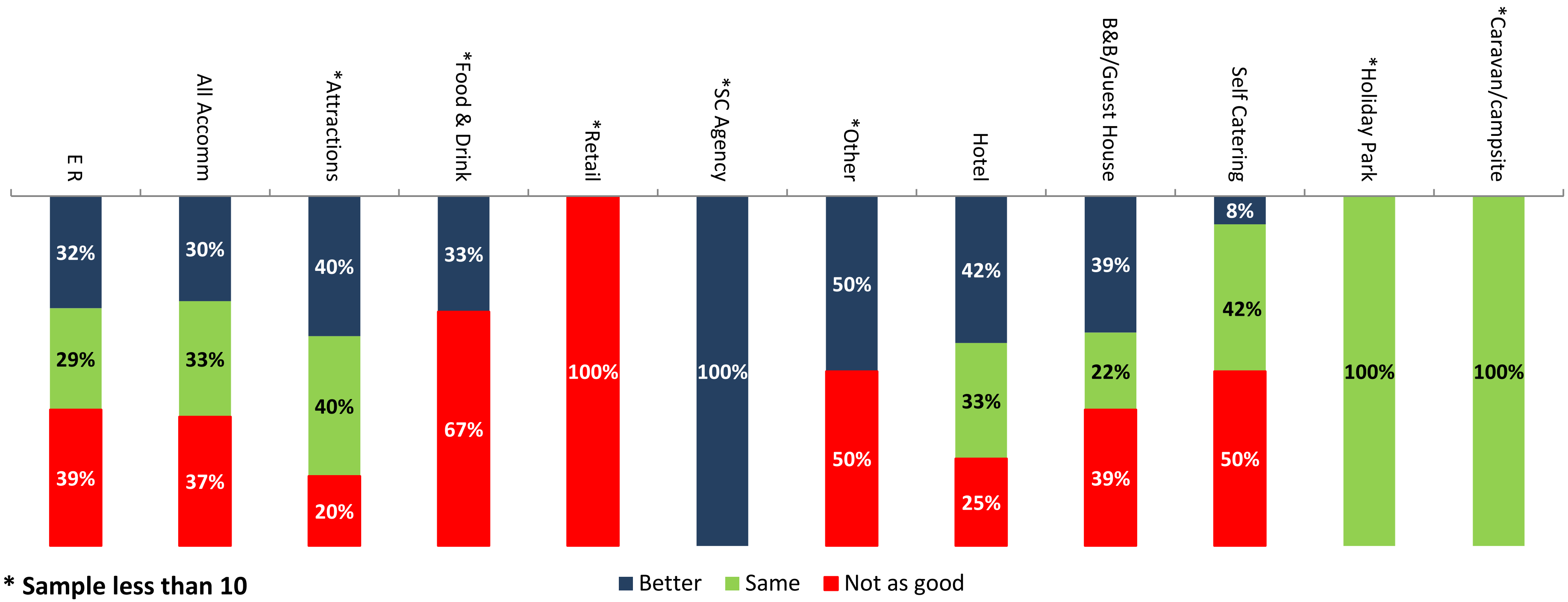


*** Sample less than 20**

Booking levels	ER	Region	*Bath	*B&P	*Bristol	Cornwall	Devon	Dorset	*Gloucs	*North Somerset	Somerset	*Wilts
Better	32%	22%	-	-	-	23%	24%	35%	8%	40%	8%	-
The same	29%	39%	-	-	-	38%	32%	35%	69%	40%	54%	50%
Not as good	39%	40%	100%	-	100%	40%	45%	30%	23%	20%	38%	50%
Base	56	194	<5	-	<5	40	85	20	13	5	24	<5

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

63% of all accommodation providers were anticipating their booking levels for Easter 2014 to be better than (30%) or similar to (33%) Easter 2013, including 75% of Hotels, 61% of B&B/Guest Houses and half of all Self Catering operators. However, the remaining half of all Self Catering operators were anticipating decreased bookings compared with the same time last year along with 39% of B&B/Guest Houses.



*** 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	32%	30%	40%	-	33%	-	-	100%	50%	42%	39%	8%	-
Same	29%	33%	40%	-	-	-	-	-	-	33%	22%	42%	100%
Not as good	39%	37%	20%	-	67%	100%	-	-	50%	25%	39%	50%	-
Base	56	43	5	-	<5	<5	-	<5	<5	12	18	12	<5

ENGLISH RIVIERA
TOURISM COMPANY
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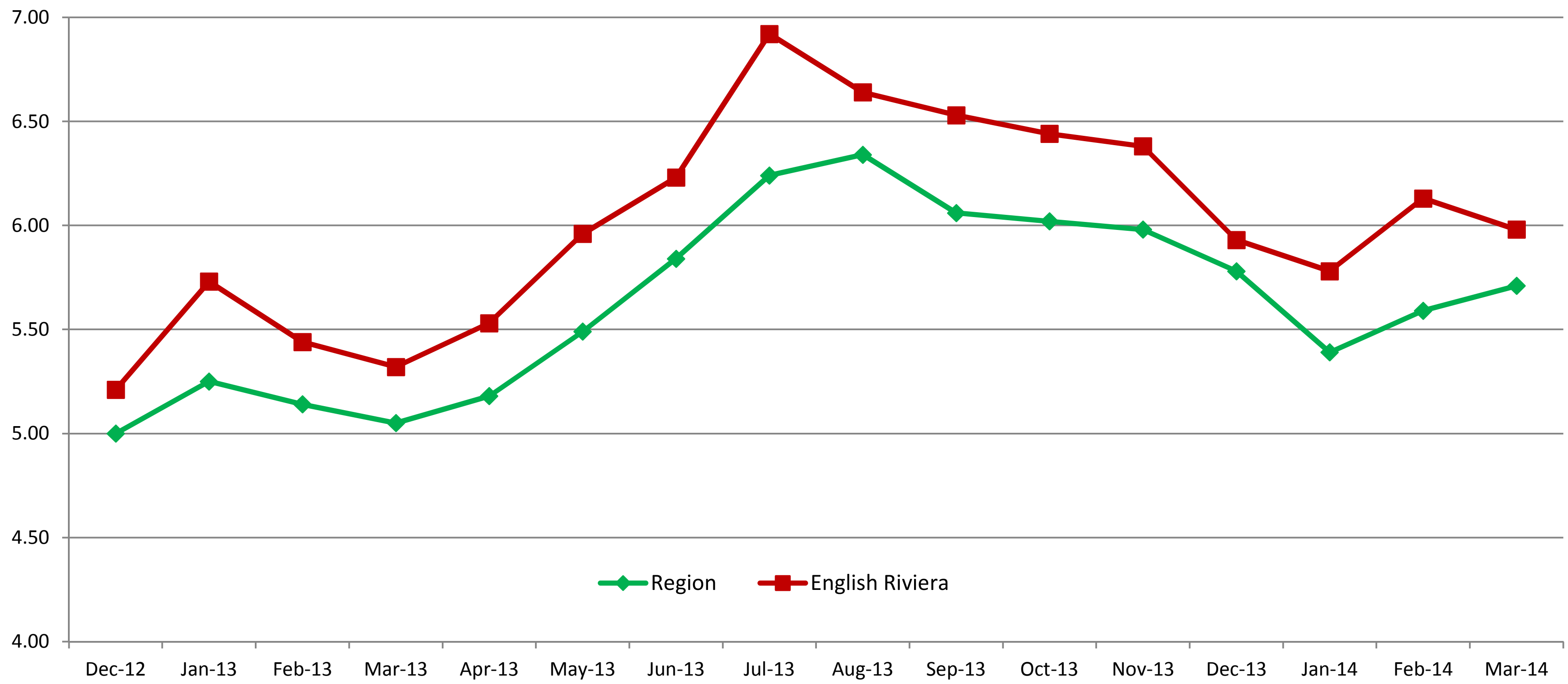
English Riviera Tourism Monitor

March 2014

Business Optimism

Business Optimism

Businesses on the English Riviera recorded an optimism score of 5.98 for March 2014 (from a possible maximum of 10) for the future prospects of tourism in their area. Whilst lower than the optimism score recorded last month it remains higher than the South West regional score for March 2014 of 5.71.



Optimism	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	Mar-14
English Riviera	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	5.98
Region	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	5.71

Business Optimism

A sample of comments from businesses regarding factors affecting their business is shown below. 44% of all respondents provided additional comments this month with the rise in parking charges, rail line closure and late timing of Easter featuring most heavily this month.

Parking fee's are set to rise again end of this month which will see once again people staying out of Town. These parking charges are in line with Exeter's yet Exeter has a bustling Town Centre to warrant them. The top end of Town struggles to attract footfall as it is ... these parking fee's will make that even harder once again.

June bookings are down at the moment. Possibly due to the World Cup or bad press re the weather and storm impact.

Late Easter helps and good weather. Yippee - trains are running again!

Footfall in area not helped by Council's attitude to visitor parking and what were good parking spaces converted to wasted spaces by Torbay Council.

Closure of railway and weather.

Roll on a good summer, great that the railway line is back open and that the west country was all over the news.

Current level of business too poor resulting from recession, floods, broken rail link, but mainly just lack of footfall.

The obvious bad publicity during the bad winter period.

Lost revenue of about £500 due to the train disruption, and the media did not help with all of the negative press about the South West.

Campaign to keep car parking cheap. Improve the cleanliness of the town centre and its car parks - we need the visitors we do get... to want to return again!

Tragic to hear council pushing back up parking just as guests were commenting on great value of £2 scheme though didn't realise could transfer around the bay (needs to put that right next to £2 sign on machines rather than higher up where nobody or few see).

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