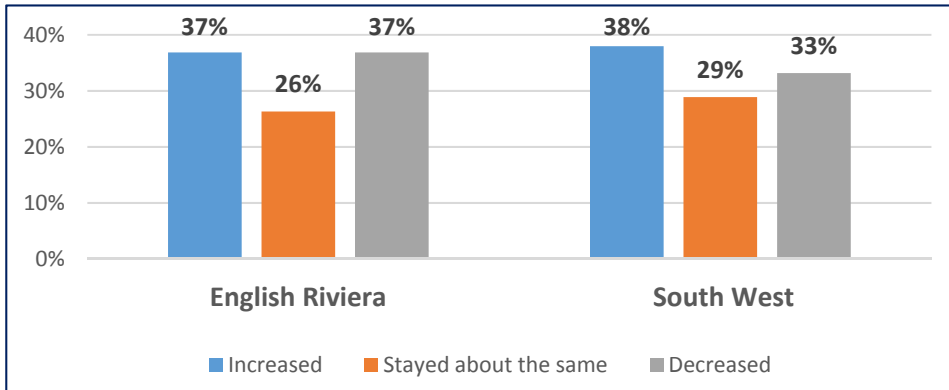


English Riviera Performance Monitor May 2017

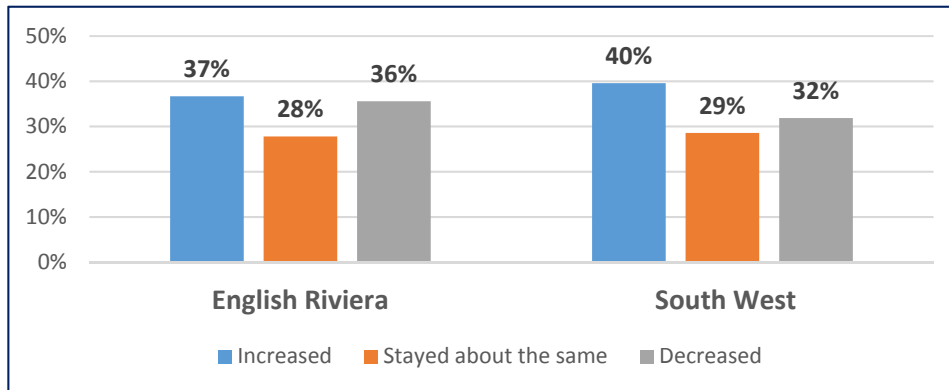
Visitor numbers compared to May 2016



Estimated actual % change

English Riviera -0.45%
South West -0.16%

Turnover compared to May 2016



Estimated actual % change

English Riviera 1.13%
South West 1.53%

| Business outlook | June | Summer season |
|--------------------------|------|---------------|
| Better than last year | 21% | 20% |
| Same as last year | 28% | 37% |
| Not as good as last year | 51% | 43% |

English Riviera Performance Monitor May 2017

| Business optimism (max 10) | English Riviera | South West |
|----------------------------|-----------------|------------|
| May-17 | 6.31 | 6.31 |
| Apr-17 | 6.49 | 6.51 |
| Mar-17 | 6.30 | 6.47 |
| Feb-17 | 6.75 | 6.65 |
| Jan-17 | 6.40 | 6.45 |
| Dec-16 | NA | 6.66 |
| Nov-16 | 5.80 | 6.36 |

| Accommodation occupancy | % | Sample |
|-------------------------|-------|--------|
| Serviced room | 43.2% | 34 |
| Hotel room | 44.0% | 5 |
| B&B/guest house room | 43.0% | 29 |
| Self catering unit | 60.1% | 10 |
| Holiday Park unit | 0.0% | 0 |
| Caravan/camping pitch | 0.0% | 0 |

Sample this month 99

This month English Riviera businesses reported a -0.45% decrease in visitors and a +1.13% increase in turnover compared to May 2016, compared with a -0.16% decrease in visitors and +1.53% increase in turnover for the region as a whole for the same period.

As anticipated last month and compared with the strong performance during April (largely influenced by the late timing of Easter), the poorer weather experienced during the month and the run up to the general election has resulted in a small decrease in visitors, although turnover increased slightly compared with the same time last year. However, the May 2017 estimates are pretty much what could be expected and whilst they don't suggest any significant uplift in business levels neither do they suggest any particular downward trend either.

Forward bookings for June and the main summer holiday period would appear to be relatively mixed at present, although the general election result has introduced an added element of economic uncertainty to proceedings, something which wasn't in short supply even as things stood before 8 June.

The full implications of this, and its impact on economic development, will become clearer in the coming weeks and months. However, at the current time the election result appears to have drawn the political centre of gravity towards a 'softer' Brexit and a reduction in the scale of austerity measures. This, coupled with the heat wave during the month of June could well mean that actual business performance will be different and provide everyone with a much better indication of how the year is shaping up.

A total sample of 99 this month (all of whom were open for the month).

Business optimism was calculated at 6.31, the same as the region as a whole. Details of month on month change are included in your trends report.

The headline indicators for May are below.

| English Riviera Tourism Performance Indicators | May 17 |
|--|--------|
| Compared to May 2016; | |
| Visitor numbers | -0.45% |
| Business turnover | +1.13% |
| Occupancy; | |
| Serviced room | 43.2% |
| Hotel room | 44.0% |
| B&B/guest house room | 43.0% |
| Self-catering unit | 60.1% |
| June outlook compared to 2016; | |
| Better | 21% |
| Same | 28% |
| Worse | 51% |
| Summer season outlook compared to 2016; | |
| Better | 20% |
| Same | 37% |
| Worse | 43% |
| Business optimism (maximum score of 10) | |
| Optimism May 17 | 6.31 |
| Optimism April 17 | 6.49 |
| Optimism March 17 | 6.30 |
| Optimism February 17 | 6.75 |
| Optimism January 17 | 6.40 |
| Optimism December 16 | n/a |
| Optimism November 16 | 5.80 |