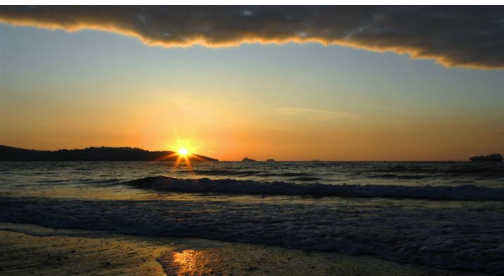


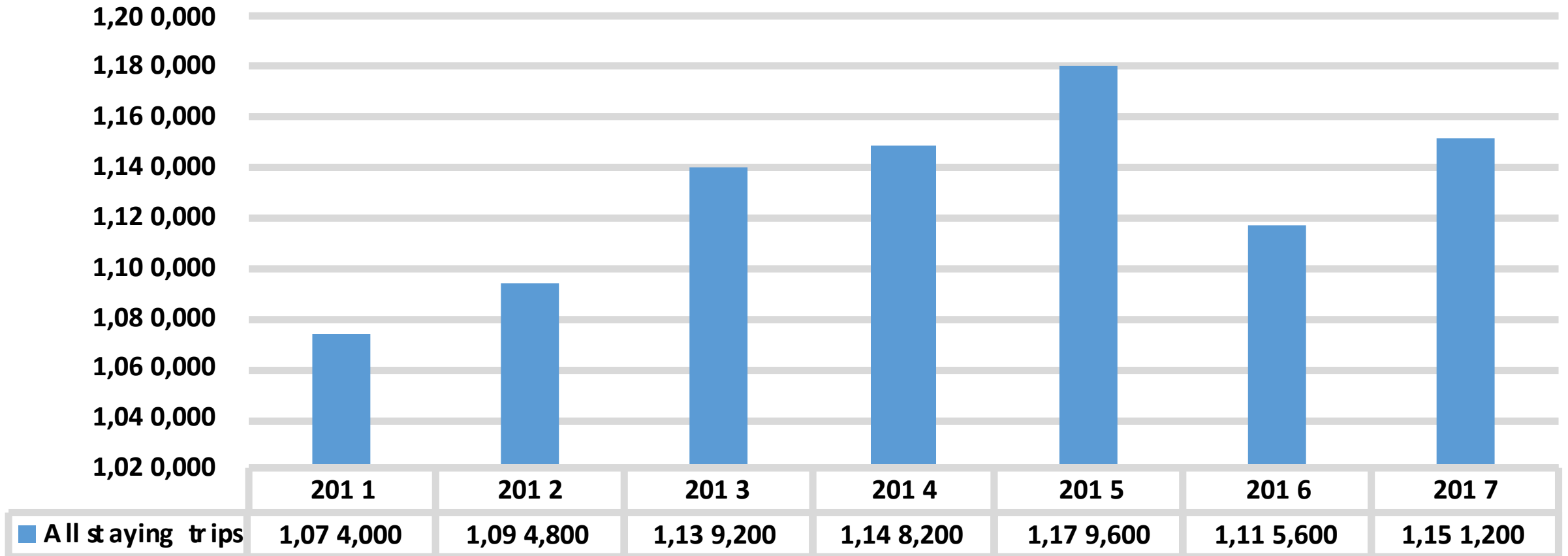
English Riviera BID Volume & Value Performance 2011-2018*



** 2018 data based on estimated data*



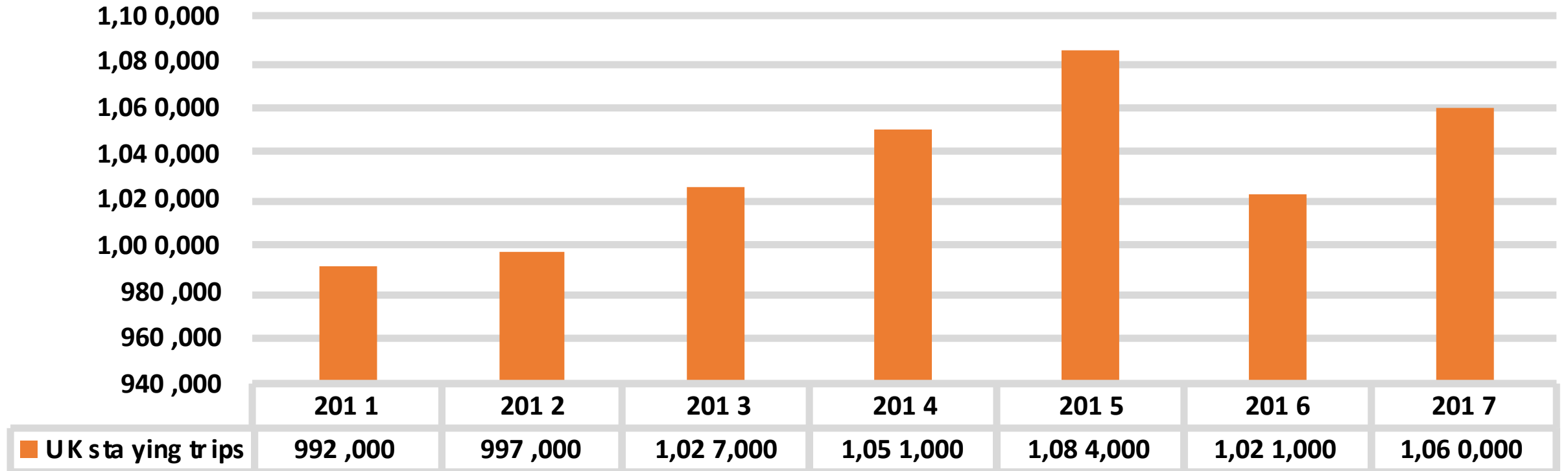
ALL STAYING TRIPS 2011-2017



Single year outputs from the Cambridge Model estimate that in 2017 approximately 1.2 million staying visitor trips were made to The English Riviera.

In terms of all staying trips the peak year for The English Riviera was 2015. 2017 trip volumes were the second highest recorded over the analysis period and 3% higher than 2016. The English Riviera has seen year on year growth in all visitor trips since 2011 with the exception of 2016 when trips decreased by 5% and in 2017 trips were 7% higher than the base year of 2011.

UK STAYING TRIPS 2011-2017

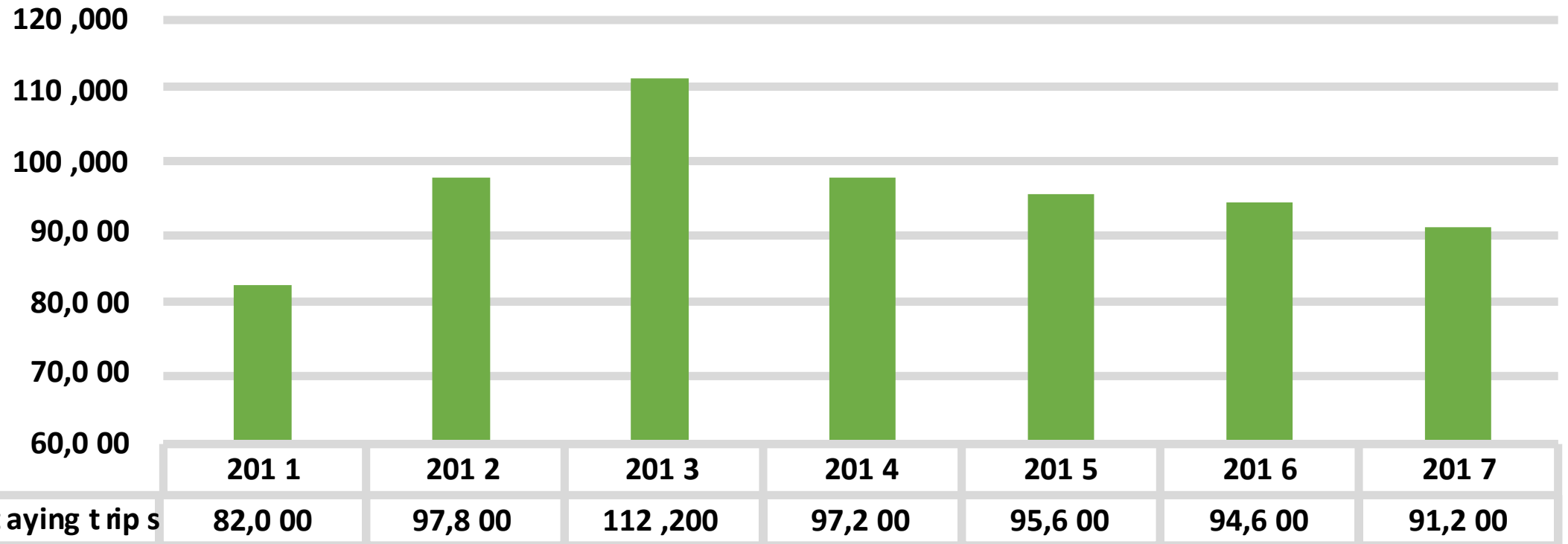


Single year outputs from the Cambridge Model estimate that in 2017 approximately 1.1 million UK staying visitor trips were made to The English Riviera.

Using Cambridge Model single year figures 2015 was a peak year for The English Riviera in terms of trip volumes and a 9% increase on the base year of 2011 whilst 2016 was the only year witnessing a decrease (-6% compared with 2015). Trip volumes in 2017 saw a 4% increase on 2016 and returned to a similar level as 2014.

Overall trips volumes in 2017 had increased by 7% from the base year of 2011.

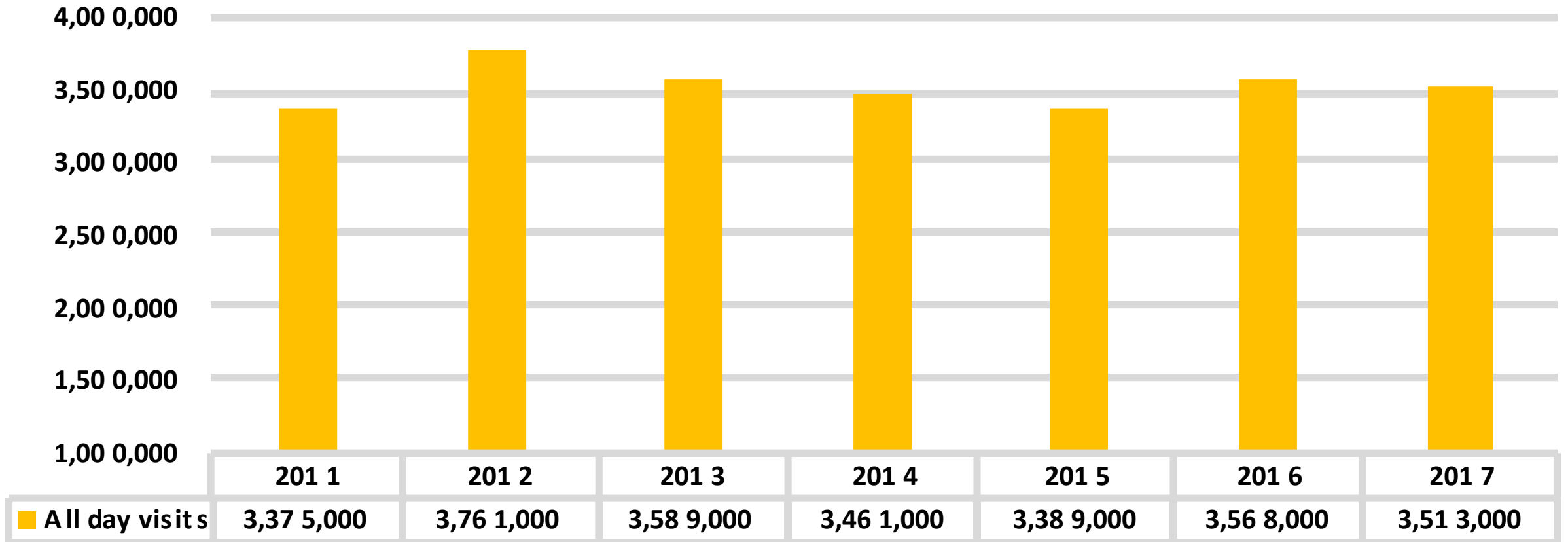
OVERSEAS STAYING TRIPS 2011-2017



Single year outputs from the Cambridge Model estimate that in 2017 approximately 91 thousand overseas staying visitor trips were made to The English Riviera.

Using Cambridge Model single year figures 2013 was a peak year for The English Riviera in terms of trip volumes and a 37% increase on the base year of 2011 but since then there have been year on year decreases. Trip volumes in 2017 were the second lowest recorded over the analysis period and were 4% lower than in 2016, but remained 11% higher than the base year of 2011 indicating overall long term growth.

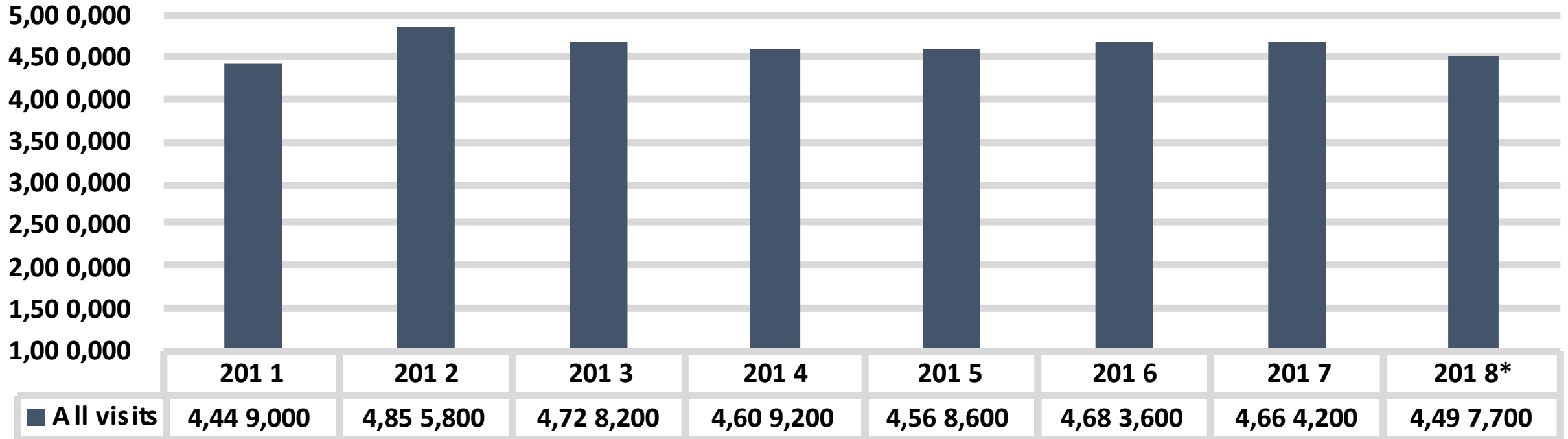
DAY VISITS 2011-2017



In 2017 the Cambridge Model estimated approximately 3.5m tourism day visits were taken on The English Riviera.

Day visitor volumes on The English Riviera peaked in 2012, the year of the Diamond Jubilee and UK Olympics, and then witnessed year on year decreases in 2013, 2014 and 2015. 2016 witnessed a 5% increase in day visits with similar levels experienced in 2017 which overall were 4% higher than the base year of 2011.

ALL VISITS 2011-2018*



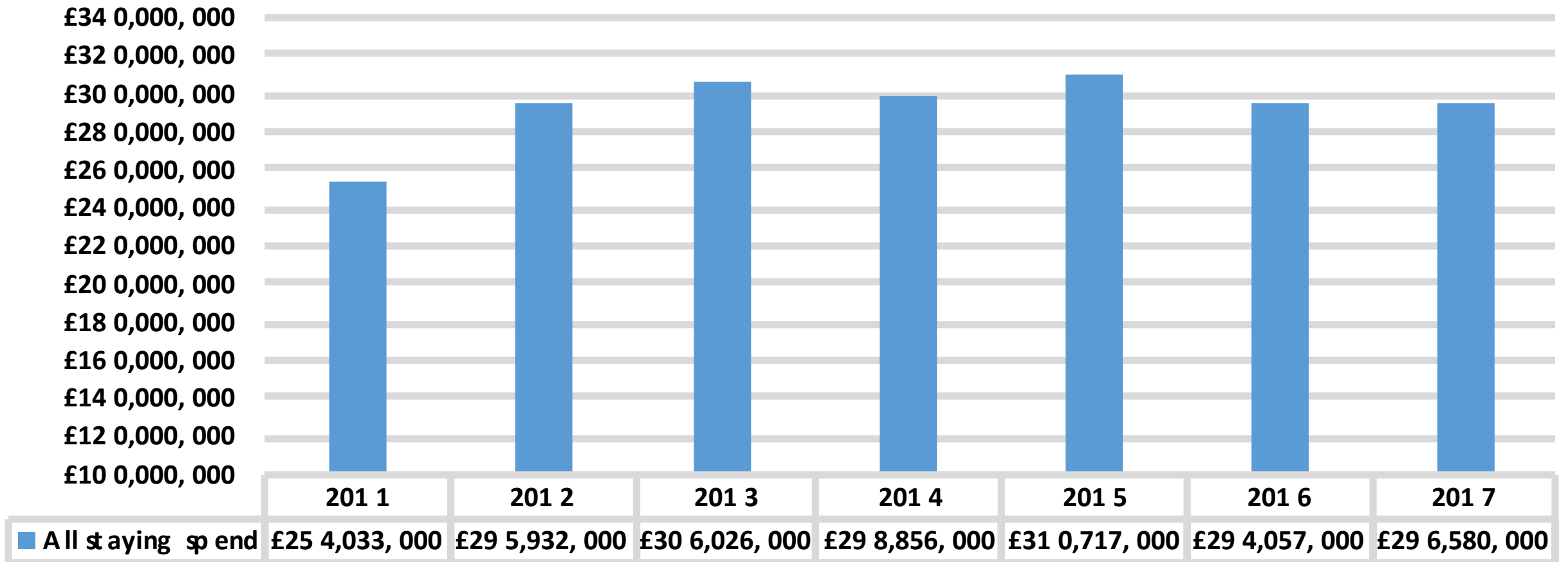
**2018 forecast data only*

In 2017 the Cambridge Model estimated approximately 4.7m tourism visits combined (day and staying) were taken on The English Riviera.

All visitor volumes on The English Riviera peaked in 2012, the year of the Diamond Jubilee and UK Olympics, and then witnessed year on year relatively small decreases in 2013, 2014 and 2015. The decreases were largely influenced by decreases in day visitor activity. 2016 witnessed a 3% increase in all visits with similar levels experienced in 2017. Overall visitor volumes in 2017 were 5% higher than the base year of 2011.

Current forecasts for 2018 from the English Riviera How's Business Survey estimate a decrease of approximately 3.5% in all visits compared with 2017.

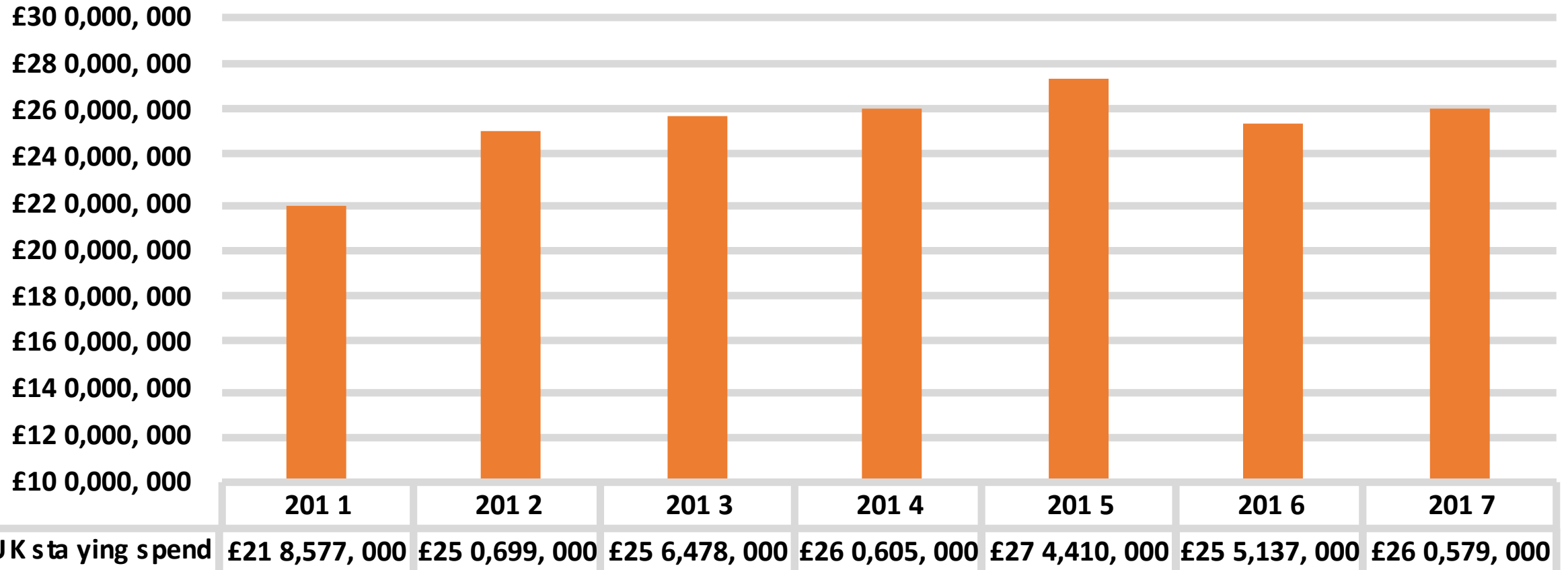
ALL STAYING SPEND 2011-2017



**Please note figures are not adjusted to account for inflation.*

2014 and 2016 are the only years in the analysis period when staying visitor spend decreased from the previous year. Overall staying visitor spend was 17% higher in 2017 than the base year of 2011 and similar to 2016 levels.

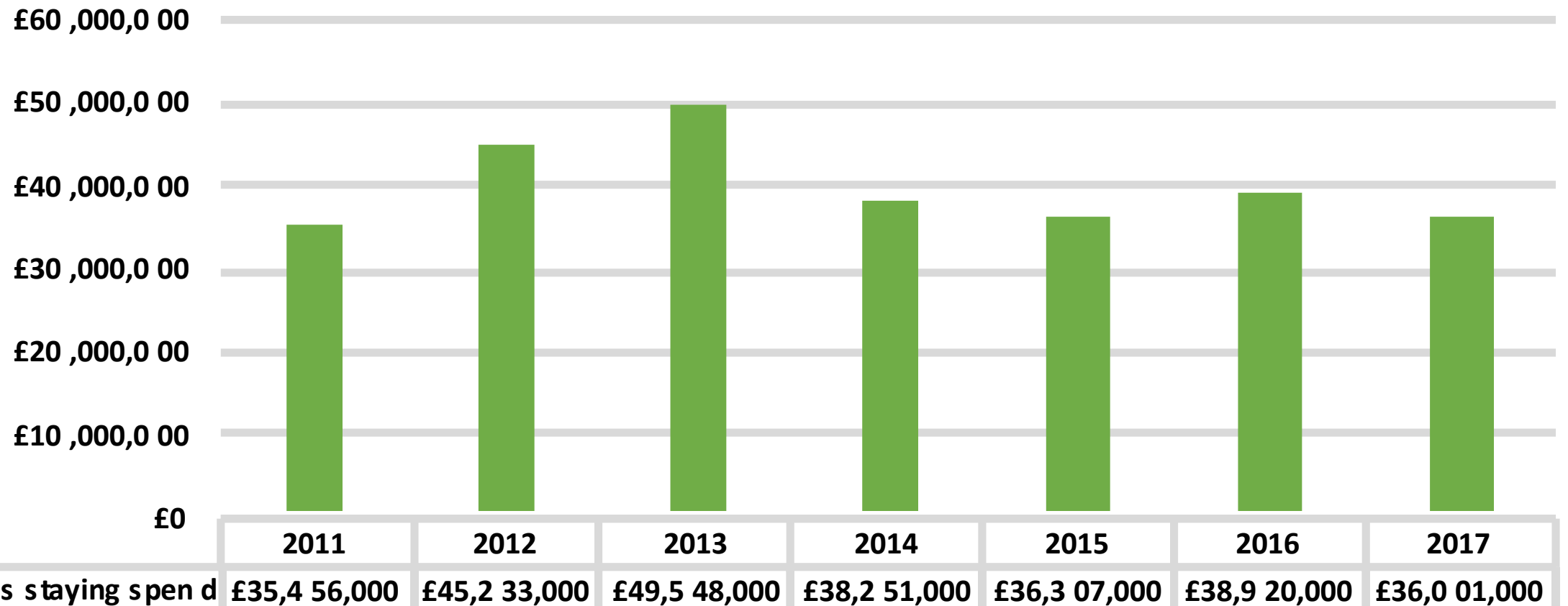
UK STAYING SPEND 2011-2017



**Please note figures are not adjusted to account for inflation.*

In a similar manner to domestic trips, spend peaked in 2015 at £274.4 million and was 26% higher than the base year of 2011. Domestic visitor spend then decreased in 2016 before increasing again in 2017 by 2% and representing a 19% increase in domestic visitor spend from the base year of 2011.

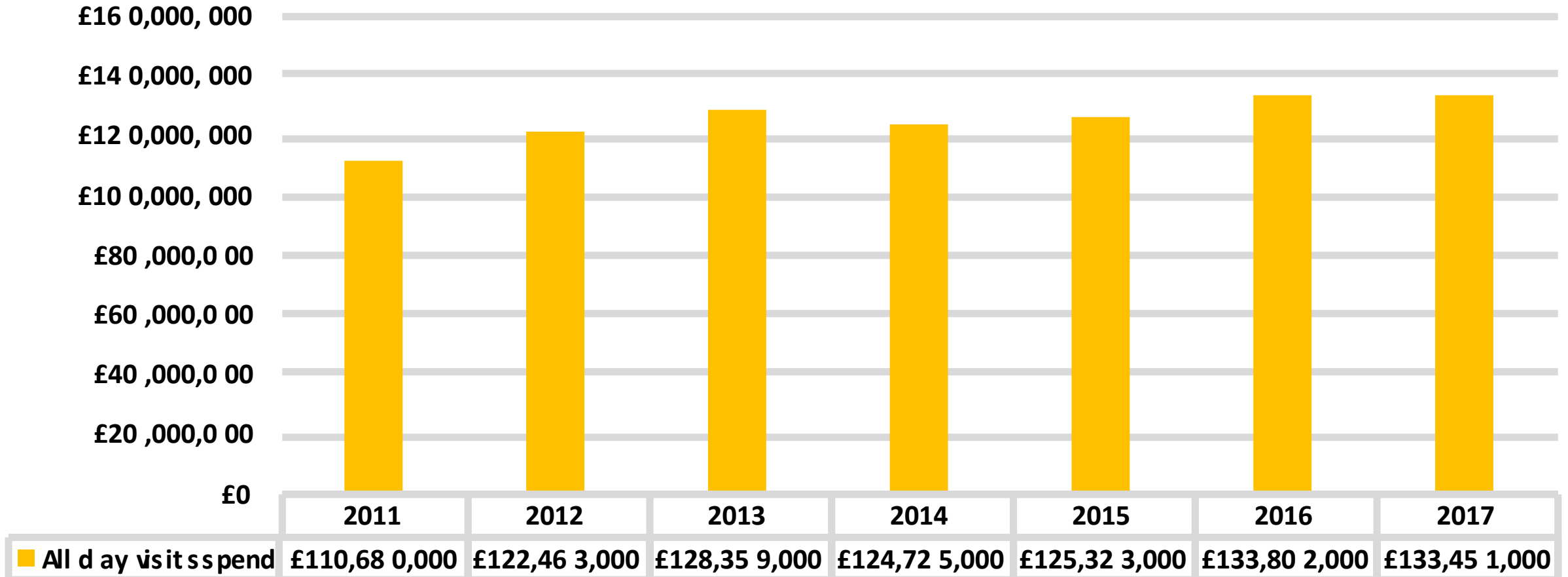
OVERSEAS STAYING SPEND 2011-2017



**Please note figures are not adjusted to account for inflation.*

Overseas spend, like trips, also peaked in 2013 at £49.6 million before decreasing year on year until 2016, which saw a 7% increase compared with 2015. Visitor spend in 2017 decreased by 8% compared with 2016 but remained 2% higher than the base year of 2011.

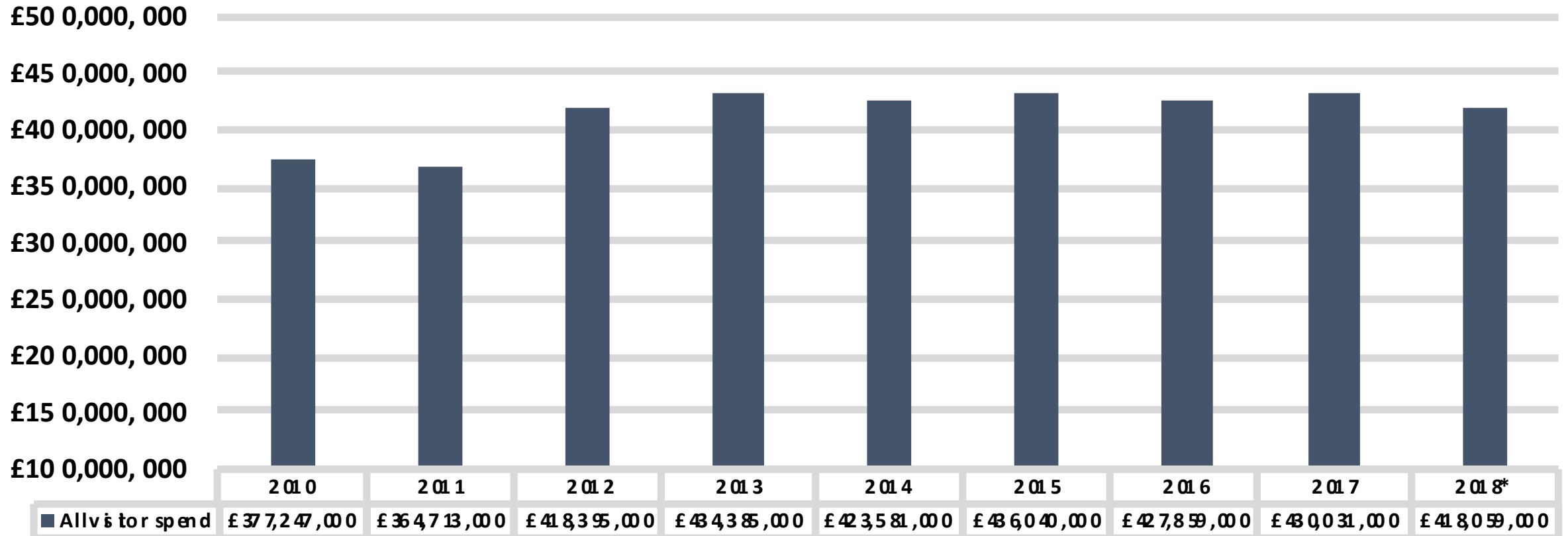
DAY VISITS SPEND 2011-2017



**Please note figures are not adjusted to account for inflation.*

Day visit spend peaked in 2013 at £128.4 million before decreasing in 2014 and remaining at a broadly similar level in 2015. 2016 saw a 7% increase compared with 2015 and 2017 remained level compared with 2016 but remained 21% higher than the base year of 2011.

ALL VISITOR SPEND 2011-2018*



**Please note figures are not adjusted to account for inflation. 2018 forecast data only.*

Visitor spend in 2017 was 18% higher than the base year of 2011 although is forecast to decrease by approximately 3% in 2018.

KEY TRENDS 2011 – 2017 - CONCLUSIONS

Overall, the performance of the English Riviera should be viewed positively over a difficult period for the tourism industry in which a number of factors such as the economy, political uncertainty, spells of extreme weather and changes in the regulations regarding taking children out of school during term time have all appeared to have impacted upon tourism levels.

When attempting to analyse tourism performance the larger context always needs to be considered and just looking at visitor numbers to a destination in isolation will never portray a true reflection as large numbers of visits will always occur or be deterred naturally by things such as the weather, economy and personal circumstances. Considering all of these factors the relative stability shown in the resort could indeed be viewed as a success and it is likely that this is linked to local investment in supporting the tourism product in the bay to retain existing visitors and influence additional new visitors, without which the picture could have indeed been very different.

Whilst not yet available at a county level, regional staying visitor estimates for 2018 to date appear to suggest that tourism levels are likely be slightly lower than those experienced in 2017 overall.