Tuesday, 1 August 2023

OVERVIEW AND SCRUTINY BOARD

A meeting of Overview and Scrutiny Board will be held on

Tuesday, 8 August 2023

commencing at 5.30 pm

The meeting will be held in the Grace Murrell Room C, Riviera International Conference Centre, Chestnut Avenue, Torquay TQ2 5LZ

Members of the Committee

Councillor Billings (Chairman)

Councillor Bryant Councillor Joyce

Councillor Steve Darling Councillor Long

Councillor Cowell (Vice-Chair) Councillor Maddison

Councillor Harvey Councillor Twelves

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, Town Hall, Castle Circus, Torquay, TQ1 3DR

Email: governance.support@torbay.gov.uk - www.torbay.gov.uk

OVERVIEW AND SCRUTINY BOARD AGENDA

1. Apologies

To receive apologies for absence, including notifications of any changes to the membership of the Board.

2. Declarations of Interest

a) To receive declarations of non pecuniary interests in respect of items on this agenda

For reference: Having declared their non pecuniary interest members may remain in the meeting and speak and, vote on the matter in question. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.

b) To receive declarations of disclosable pecuniary interests in respect of items on this agenda

For reference: Where a Member has a disclosable pecuniary interest he/she must leave the meeting during consideration of the item. However, the Member may remain in the meeting to make representations, answer questions or give evidence if the public have a right to do so, but having done so the Member must then immediately leave the meeting, may not vote and must not improperly seek to influence the outcome of the matter. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.

(**Please Note:** If Members and Officers wish to seek advice on any potential interests they may have, they should contact Governance Support or Legal Services prior to the meeting.)

3. Urgent Items

To consider any other items that the Chairman decides are urgent.

4. Spotlight Review on English Riviera Airshow

To carry out a spotlight review on the English Riviera Airshow:

(Pages 4 - 128)

Key Lines of Enquiry:

- how is the is it funded?
- how does our spend and format on the English Riviera Air Show compare to other air shows?
- what should the English Riviera Air Show look like moving forward?
- how will it be delivered in the future?
- what is the social benefit of the Air Show?
- what other events could take place across Torbay as part of the Air Show?

- how is the environmental impact of the Air Show measured?
- how many tourists were drawn into the Air Show and how much did local businesses benefit?

(Note: Members of the Air Show Working Party have been invited to take part in this meeting as well as representatives from the Business Forum; Torquay, Paignton and Brixham Chambers of Trade and Commerce; Brixham Town Council; English Riviera Business Improvement District ERTBID Company; and Paignton Town and Preston Community Partnership).



Wards affected: All wards

Report Title: Spotlight Review of English Riviera Airshow

When does the decision need to be implemented? August 2023

Cabinet Member Contact Details: Cllr Chris Lewis, Cabinet Member for Place Services and

Economic Growth. chris.lewis@torbay.gov.uk

Director/Divisional Director Contact Details: Lisa Tuck. Divisional Director Economy,

Environment, and Infrastructure. lisa.tuck@torbay.gov.uk

1. Purpose of Report

1.1 The purpose of this report is to provide the Overview and Scrutiny Board with relevant information to carry out a spotlight review of the English Riviera Airshow. The report contains background information relating to costs, funding structure, delivery model, socio-economic impacts and provides comparison to other Airshows in the UK.

2. Reason for Review

- 2.1 Torbay Council has delivered the English Riviera Airshow (formerly known as the Torbay Airshow) annually since 2016, with the exception of 2020 due to the Covid 19 Pandemic and 2021 due to poor weather conditions.
- 2.2 Torbay Council has underwritten the costs of the free to access Airshow each year. The Overview and Scrutiny Board have decided to carry out a review of the Airshow, to assess its value for money, financial contribution required by the Council and community and economic benefits, in order to make a recommendation to Torbay Council's Cabinet on the future delivery of the Airshow.

3. Recommendation(s) / Proposed Decision

- 3.1 That the Overview and Scrutiny Board consider the information contained in this report, alongside the Torbay Council English Riviera (Outdoor) Events Strategy 2021 2027, English Riviera Destination Management Plan 2022 2030, and the views of Members of the Airshow Working Party, the Torbay Business Forum, Torquay, Paignton, Brixham Chambers of Trade and Commerce, Brixham Town Council, English Riviera Business Improvement District (ERTBID) Company, Paignton Town and Preston Community Partnership.
- 3.2 That the Overview and Scrutiny Board consider the officer recommendations in this report and make a recommendation to Torbay Council Cabinet, to be considered at the meeting of Torbay Council Cabinet on 15 August regarding the future of the English Riviera Airshow.

Appendices

- Appendix 1: English Riviera Airshow Evaluation 2023 Final Report
- Appendix 2: English Riviera Airshow Evaluation Report
- Appendix 3: Riviera Airshow 2024: Learning points and suggestions for future Air Shows
- Appendix 4: Map of Airshow 2023 Event Space
- Appendix 5: Overview and Scrutiny English Riviera Show Survey with Community Partnership Summary Results

Background Documents

Torbay Council English Riviera (Outdoor) Events Strategy 2021 – 2027 Events Strategy Appendix.pdf (torbay.gov.uk)

English Riviera Destination Management Plan 2022 – 2030 <u>English Riviera Destination</u> <u>Management Plan - Torbay Council</u>

British Airshows calendar English Riviera Airshow, Torbay (britishairshows.com)

1. Introduction and Background

- 1.1 The English Riviera Airshow (formerly called the Torbay Airshow) is an annual 2-day air display event, with the ground show and event area held on Paignton Green. The Airshow acts as a headline event in the event programme for Torbay, in line with the Council's adopted English Riviera (Outdoor) Events Strategy and Destination Management Plan.
- 1.2 The event is owned and delivered by Torbay Council. In 2017 the Council commissioned the management of the event to a third party for a 5-year contract period. The contract includes services such as event planning and safety, trader and concession management, marketing, flight co-ordination and programming, show communication, security and waste management. The contract is due to end following the 2023 Airshow.
- 1.3 In recent years the Council has worked in partnership with the English Riviera BID company who have supported the event through marketing, promotion and contributed funding towards delivery.
- 1.4 The event is supported by the Airshow Working Party of Torbay Councillors who provide scrutiny and advice to inform and ensure successful delivery of the Airshow.
- 1.5 The 2016 Torbay Airshow was funded through a combination of pump priming funds from the Coastal Communities Fund, with match funding through sponsorship and advertising sales. However, the match funding acquired fell short of estimates and unexpected costs required £250,000 of additional funding from Torbay Council. Subsequent annual costs of the Airshow can be found in paragraph 3.2.
- 1.6 The 2-day Airshow event delivered by Torbay Council staff and partner organisations continues to be extremely popular in terms of public response, audience participation, visitor attraction and has a positive economic impact.
- 1.7 An Economic Impact Assessment was carried out following the 2016 Airshow which estimated that between 2016 and 2019 the cumulative benefit of the Airshow on the Torbay economy of was estimated to be £33m.
- 1.8 A further economic impact assessment has been completed following the 2023 Airshow, the results discussed in section 5 of this report.

3. Review of 2023 Airshow Costs

3.1 The 2023 Airshow was financed through a mix of income from traders and concessions, private sector sponsorship, English Ripper Ellocompany contribution and Torbay Council

funds. The Torbay Council Events Team provide essential resources including but not limited to contract management, event co-ordination, budget control, volunteer management, programme co-ordination and ground event co-ordination.

3.2 Since its inception Torbay Council has provided financial support to the Airshow as follows:

| Year | Total Airshow Cost | Council contribution |
|------|--------------------|--|
| 2016 | £543,000 | £250,000 |
| 2017 | £283,000 | £122,000 |
| 2018 | £225,000 | £145,000 |
| 2019 | £239,000 | £90,000 |
| 2020 | Cancelled | |
| 2021 | Cancelled | |
| 2022 | £249,000 | £145,000 |
| 2023 | £305,000 | £120,000 (+£75,000 additional request) |

- 3.2 The Airshow was intended to become financially sustainable, with little or no financial contribution from Torbay Council required by 2020. It was expected that financial support for the Airshow would be provided through private sector sponsorship, sales of advertising space, business and public donations and income generation through traders and concessions. This has clearly been harder to achieve than anticipated.
- 3.3 The costs of the Airshow in 2023 have risen more than anticipated, in line with the general increase in cost of business, trading, living and utilities during 2023.
- 3.4 Since 2016 the Council has commissioned the sponsorship and advertising sales element of the Airshow. This approach has not been successful with income generated falling significantly short of estimates.

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| | Actual Cost |
|------------------------------------|-------------|
| Expenditure | |
| Event Management | £49,858.22 |
| Flying content, ground support & | |
| insurance | £110,358.23 |
| Signage and road closures | £12,517.05 |
| Waste Management | £7,975.34 |
| Medical, Health and Safety | £13,690.87 |
| Security and stewarding 24/7 cover | |
| & CCTV | £26,308.49 |
| General Site costs | £1,851.49 |
| Marquees & Furniture | £11,023.14 |
| Power, Water & Toilets | £15,229.24 |
| P.A.'s, Mics and Radios | £15,276.43 |
| Marketing and Comms & Survey | £28,070.50 |
| Various activities | £4,343.00 |
| Hospitality catering | £5,360.00 |
| Expenditure Total | £305,102.00 |

| Income and Available Budget | |
|-----------------------------------|-------------|
| Exhibitors | £9,180.00 |
| Food and Beverage | £37,175.00 |
| Concessions | £14,000.00 |
| Ticketing (Parking) | £6,603.00 |
| Sponsorship generated by Clearsky | £30,075.00 |
| ERBid Partner Support | £24,000.00 |
| Donations and programmes | £5,414.84 |
| Torbay Council | £120,000.00 |
| Income total | £246,447.84 |
| Variance | -£53,654.16 |

- 3.7 If a decision is made by Torbay Council Cabinet that the Council will continue to own and deliver the Airshow a new approach to driving private sector and public contribution to the costs will be required. Various approaches could be considered including bringing sponsorship sales back inhouse, complete redesign of sponsorship packages, crowd funding and public donation campaigns. It should be noted that Teignmouth Airshow have found that teaming up with organisations to share fund raising e.g., Girl Guides on a 75/25 split basis has been successful.
- 3.8 If Torbay Council continues to own and deliver the Airshow consideration should also be given to reducing the overall costs or increasing the commercial income potential in order to reduce the pressure on the public purse. Consideration could be given to:

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- o Reducing the period of the Airshow (e.g. to 1 day).
- o Reducing the number of displays, with a focus on those that are lowest cost.
- Seeking ground show displays that are low cost or free.
- Offering a more attractive package to increase the number of traders and concessions.
- Reducing the event space area to reduce overall costs of road closures and stewarding.

4. Review of 2023 delivery model

- 4.1 The Airshow is a complex event, requiring specialised services such as air traffic control, specialised insurance, harbour and beaches safety interventions alongside the complexities of organising a large free to access ground event. From 2020 to 2023 the Council has delivered the Airshow through a combination of commissioning of Event Project Management Services, and direct co-ordination and delivery.
- 4.2 The Torbay Council Events Team are the primary service that deliver a successful Airshow each year. The Team also manage and support the enthusiastic and committed volunteers. In total 155 hours of volunteer time are provided to support the event.
- 4.3 The capacity of the Councils Events Team is 2.5 FTE with management support. Alongside the co-ordination, contract management and direct delivery of elements of this highlight event in the Torbay calendar, the Team are also tasked to co-ordinate and deliver the wider Torbay events programme and deliver the English Riviera Event Strategy, including facilitation and enabling of events on Council owned land, facilitation and support for local organisations to run events in the Bay, direct co-ordination and delivery of events, and commissioning of private or community sector organisations to provide a vibrant event programme.
- 4.4 The Events Team has the potential to focus on increasing the commercialisation of events in order to facilitate a wider events programme in the Bay, however a review of workforce and operational strategy of the Team is required in order for the ambitions of the English Riviera Events Strategy to be fulfilled. The outcomes of this review will help to shape the future operational strategy of the Events function. It is essential that consideration is given to the appropriate resourcing of the Events team to enable achievement of the Council's ambitions.

- 4.5 The Events Team generate income through their activities, however this is currently being used to offset the costs of staffing as income targets are set annually against core costs. In order for income generation from events to support a wider events programme across the Bay, income targets should be reviewed for 2024/25 while new operational strategy and processes are embedded. This will allow for increased staffing and capacity to increase facilitation of events and bring new event spaces into use. Increased facilitation and new event spaces will ultimately result in increased income generation that can be used in future years to increase the Torbay events programme or to offset the costs of the service.
- 4.6 Delivering large events requires agility and the ability to respond to unknown or unexpected circumstances, where audience attendance, weather, changes to legislation and regulations and the state of the economy can play a role in success. The Airshow is at particularly high risk of cancellation or last-minute change as a result of the weather conditions.
- 4.7 When considering the future delivery of events consideration should be given to market intelligence that attendance numbers for new events can be low and it can take several years and iterations to achieve attendance targets.

Harbours and Beaches delivery

- 4.8 The main function of the Harbour Authority during the Airshow is to Police the Maritime Exclusion Zone (MEZ). The MEZ must be clear prior to the Flight Programmer, commencing the show. At present the costs of the MEZ markers and mooring chains and fuel for the volunteers from the sailing clubs who, under the direction of the Harbour Authority police the MEZ whilst the Airshow is underway, are included in the Airshow budget.
- 4.9 At present the Harbour Authority must facilitate both the deployment and recovery of the MEZ markers which takes (on average with good conditions), approximately two days. The deployment is above the harbour's normal duties and creates additional cost to the Council and Harbour Authority through overtime or TOIL for harbour staff. TOIL also adds pressure to the Harbour staff when taken within season from April to September.
- 4.10 Policing the MEZ has become increasingly difficult due to the increase in the use of jet ski's which is a safety concern. The Airshow Maritime Risk Assessment includes a need for a Police presence, which is not guaranteed due to cost. The Harbour Authority supports the costs of additional stewarding for the duration of the Airshow, however there is a risk in assuming volunteer numbers will sustain, and if the Airshow continues in the future financial assistance will be required to sustain volunteer numbers and provide sufficient stewarding of the water.

Comparison with other UK Airshows

- 4.11 Research has been carried out into other Airshows held in the UK of similar size to the English Riviera Airshow. The research looked at the following elements:
 - Attendance Numbers
 - Entry Fee
 - Public Financial Contributions
 - Delivery Model
 - Sponsorship Model
 - Total Cost
 - Offer
 - Any other information.
- 4.12 The following Airshows on the UK Airshow event calendar were researched:
 - Teignmouth
 - Bournemouth
 - Rhyl
 - Folkstone
 - Guernsey
 - Jersey
 - Blackpool

- Clacton
- Southport
- Swansea
- Eastbourne
- Weston-Super-Mare
- Sunderland
- 4.13 A mix of desk top research and direct contact with the organisations responsible for delivering the Airshows was used to gain the information needed to carry out the review. It has been challenging to obtain responses from the organisations responsible for the Airshows, around the Local Authority contribution, and therefore the information provided is not complete. However, the research overall provides a range of useful findings.

4.14 Findings - Delivery

- Two Airshows were cancelled in 2022/23 with the withdrawal of financial support from the local authority, Weston-Super-Mare and Sunderland.
- All Airshows with the exception of Southport are free to access.
- Teignmouth Airshow is established as a community interest company, run by volunteers with the capacity to attract charitable sector funding and donations, alongside community and local business support.
- The cost of delivering the Teignmouth Airshow is significantly lower than the cost of the English Riviera Airshow as event management is carried out by experienced volunteers rather than outsourced to a contractor. Also, the air displays occur in one afternoon over the weekend.

- Many of the Airs Shows are owned by the Local Authority and delivered by an inhouse team (with flight specialist support) and are underwritten by the Local Authority – Torbay, Bournemouth, Clacton, Southport, Swansea, Eastbourne.
- Other models include ownership and delivery by a private sector Leisure company (Rhyl), standalone not for profit organisations (Jersey, Guernsey, Teignmouth) and Destination Management Organisations (Visit Blackpool).

4.15 Findings - Funding

- Guernsey Air Display is wholly financially supported by a consortium of local businesses and corporate friends, who also provide all the funding, with friend's membership open to all. Over 20 sponsors.
- Jersey Air Display is predominantly Local Government funded, with support from Ports, large businesses and individual donations.
- Teignmouth is funded through a mix of grant applications, public sector contribution, donations, sponsorship and fundraising, trader and concession fees. As a community-based organisation Teignmouth have been able to attract considerable public support and sponsorship.
- Clacton, Bournemouth, Swansea and Torbay all use similar funding models, a mix of Local Authority Funding, sponsorship and trader and concession fees. Tendring District Council provide £50,000 of funding towards the £250,000 costs of the Clacton Airshow and Swansea raising 30% of event costs from sponsorship.
- Southport is the only Airshow researched that offers the event on the beach, which is fenced off to enable ticket sales. The Southport Council covers all costs, with income from advertising in programmes, programme and ticket sales, no sponsorship is sought.
- Bournemouth, Christchurch and Poole Council raises the full £425,000 costs of the Airshow with some surplus, with funding from sponsorship and other bodies such as the BID, Chamber of Commerce and the Local Authority raises substantial sponsorship Eastbourne Events, sells merchandise and raises donations.

4.16 Finding - Costs and offer

- The cost of the Airshows researched ranges from £90,000 for an afternoon of flying displays as part of a wider 3-day event with attendance of 35,000 to £800,000 for a 4-day event with displays each day and attendance of 1,000,000.
- Clacton offers a 2-day flying event at a cost of £250,000 including a traders and armed forces village, with circa 250,000 visitors, and is the closest in offer to the English Riviera Airshow. A recent economic impact report estimated local income to be £17.7m and regional income to be £5.98m.

5. Economic Impacts

- 5.1 An Economic Impact Assessment of the 2023 English Riviera Airshow was commissioned by Torbay Council and the English Riviera BID. The full report is included at Appendix 1. The highlights of the report are as follows:
 - The investment in the event by Torbay Council returned a very healthy return of £15.56 for every pound invested.
 - In 2023 the total gross spend associated with the English Riviera Airshow was £3.5m.
 - £1.8m of the total spend is estimated to be new expenditure that would not have occurred without the Airshow taking place. 18% occurred at the event/Paignton seafront (£0.3m) and the local area with the other 82% occurring in the wider Torbay area (£1.5m).
 - When further rounds of spending that occurred as a result of the visitor spend are considered, the new visitor spend generated a total of £2.5m.
 - A total of 65,000 visitor days were spent at the event with the total visitor days associated with the event equating to 89,000 (65,000 Airshow attendance + other staying visitor days in Torbay away from the event).
 - The Saturday was the better attended day of the two Airshow days attracting 36,000 attendees in comparison to 29,000 on the Sunday.

Face to Face Survey

- The feedback from event attendees was very positive with 96% being very satisfied or satisfied with their experience and 94% stating that they would be very likely or likely to visit again.
- 86% agreed that it brings a sense of local/civic pride to the area and 84% that it is of great importance to the local economy. 66% of local residents disagreed that the event caused unnecessary littering, traffic congestion and pollution to the town.
- 59% of attendees were repeat visitors and knew about the event from a previous visit.
- 61% of attendees had visited the event on one day and 39% on both days.
- Local residents of Torbay accounted for 53% of all event attendees, followed by 25% who
 were categorised as staying visitors (22% staying overnight in Torbay at the time of the
 event and 3% staying in nearby accommodation outside of Torbay) and 22% who were
 categorised as day visitors from home who lived outside of Torbay.
- 43% of all attendees had travelled to the Airshow by car/van/motorcycle on the day of their interview, 37% had walked to the event with the next most popular mode of transport being a public bus/coach service (12%).

Local Business Survey

- Overall, there was a very high level of support amongst local businesses for the Airshow with 77% agreeing that it brings a sense of local/civic pride to the area. 43% agreed that the event was of great importance to their business.
- The large majority of businesses showed support for the event with 76% agreeing that it was of great importance to the local economy and 77% agreeing that it was of great importance to the overall image of the local area.
- 49% of businesses responding to the survey said that the Airshow brings additional
 visitors/customers to their business which they would otherwise not receive. 30% said their
 business would still achieve the same numbers of visitors/customers even if the Airshow did
 not take place and 21% said the event reduces the numbers of visitors/customers to their
 business when it is taking place. The overall result was a net positive result of 28%.
- 42% of businesses reported increased turnover during the Airshow. 36% said their turnover had stayed the same and 22% reported decreased turnover as a result of the Airshow taking place. The estimated overall change in turnover was +8% for all businesses.

Trader Survey

- Overall, satisfaction levels were relatively good amongst suppliers/traders with 72% very satisfied or satisfied with the level of business they received.
- 86% of suppliers/traders said they would be interested in supplying/trading at the event in 2024.
- 71% of suppliers/traders responding to the survey undertook initiatives for the Airshow. The largest proportion, 64%, recycled waste where possible, 50% didn't use or sell single use plastics, 29% switched off electrics where possible and 7% promoted public transport.
- Additional local staff employed for the event generated approximately £9,000 in local wages.

5.2 ERBID review:

The English Riviera Business Improvement District Company (ERBID) are the Council's main partner, key sponsor of the Airshow and have contributed to the cost of the Economic Impact Assessment. Comments from the ERBID in response to the review are as follows:

"The ERBID2 5-year Business Plan (2022-2026) makes a commitment to increasing the company's investment in developing a world class year-round Events programme. To help achieve this, a new Events Development Partnership with Torbay Council and the ERBID Company has been agreed. This new partnership recognises the annual English Riviera Air Show

as a signature event with national appeal and an opportunity to raise our profile as a leading UK Seaside destination.

This year, the ERBID Company joint funded an Economic impact Survey into the Airshow. For the ERBID Company, this was essential to ascertain whether we, as an organisation, representing 1300 local tourism and hospitality businesses, were getting overall value for money for our levy payers from our £20,000 annual investment.

The following findings highlighted in the Economic Impact Survey confirm the Air Shows overall value and therefore as a company, we want to see the Air Show continue and for it to take place in 2024 as the resort continues to try and retrieve pre-COVID visitor volume and spend.

- 2023 Airshow resulted in a strong return on everyone's investment with £15.56 returned for every £1.
- 54% of all staying visitors said the Airshow had been the main reason for them choosing to visit
- 59% of attendees were repeat visitors and knew of the event from a previous year.
- 80% of businesses reported either increased visitors/customers (48%) or stayed the same (32%)

As mentioned in the report the council does, however, spend a considerable amount of money. As an organisation, heavily involved in both marketing of the English Riviera and delivery of, or support to, events, in our professional opinion three fundamental improvements can be made, which together can increase returns, plus, as importantly reduce costs of delivery:

Marketing - the marketing of the Air Show could be improved to increase its reach and ability to attract more overnight visitors across the resort.

Sponsorship – a more targeted sponsorship package can increase income to offset costs.

Secondary Income generation – as an example it was notable on the limited numbers of concession stands at Paignton, as well as none spread around the Bay at specific vantage points as many residents and visitors view from multiple locations. It was noted within the report, under recommendations 'May be worth promoting alterative places where the Airshow can be observed away from the main event'. These should, and could be increased, using, in our opinion more local suppliers, thus increasing local economic benefit.

As the resorts lead on Destination Marketing, the ERBID Company would welcome greater involvement in developing and delivering a more tactical and integrated Air Show Marketing Strategy for 2024 that maximises opportunities for more of our local businesses. "

6. Social and Environmental Impacts

- 6.1 Information on the social benefits of the Airshow is not collected in order to provide any measurable statistics, however there are benefits that can be assumed such as:
 - Provides an opportunity for residents and visitors to experience an intergenerational and inclusive event.
 - Brings the community together to foster new connections and creates a sense of community spirit.
 - Encourages young people to live, work and stay in Torbay.
 - Provides opportunities for participation, volunteering and social and cultural activities.
 - Provides inspiration to invest in ideas and careers.
 - Creates a sense of pride in place.
- 6.2 The environmental impact of the English Riviera Airshow is not measured. Sunderland City Council cited climate change and their commitment to tackle the global climate emergency by reducing carbon emissions as the reason for making it harder to justify continuing with the Airshow and have cancelled the Sunderland Airshow indefinitely.
- 6.3 Offsetting the environmental impact of the Airshow could be considered if the Airshow is supported by Torbay Council going forward, the Airshow already supports and promotes sustainable travel and the use of single use plastics, however both of these could be strengthened.

7. Options for consideration

- 7.1 A thriving and vibrant events programme in Torbay, with some free to access events, as outlined in the Councils English Riviera (Outdoor) Event Strategy, can support delivery of the following objectives of Torbay Councils Community and Corporate Plan.
 - We want Torbay and its residents to thrive.
 - We want Torbay to be a place where we have turned the tide on poverty and tackled inequalities; where our children and older people will have high aspirations and where there are quality jobs, good pay and affordable housing for our residents.
 - We want Torbay to be the premier resort in the UK, with a vibrant arts and cultural offer for our residents and visitors to enjoy; where our built and natural environment is celebrated and where we play our part in addressing the climate change emergency.

and supports:

- Thriving people; thriving economy; tackling climate change; Council fit for the future.
- Tackling poverty, deprivation and vulnerability.
- People with learning disabilities.
- 7.2 Torbay Council has a range of options available in terms of the types of events it facilitates and operating models in order to fulfil these ambitions.
- 7.3 The Council, as part of the English Riviera Destination Management Plan is committed to enabling a range of events, especially those that focus on Torbay as a year-round destination and lengthening the typical visitor season.
- 7.4 The range of options includes (but is not limited to):
 - Continued Torbay Council ownership and delivery of the Air Show as a free to the community, highlight event.
 - Delivery of the Airshow by a dedicated in-house team, and/or commissioning of a thirdparty event management company.
 - Providing resources to fully commercialise the Air Show in order for there to be no requirement from Council budgets.
 - Facilitating the provision of the Air Show by another organisation (e.g. not for profit).
 - Removing financial support for the Airshow and redirecting financial support into other (new) events across the Torbay event calendar.
 - Removing financial support for the Airshow with no plans to redirect.
- 7.5 For options that consider continuing Torbay Council ownership and delivery of the Air Show the learning points and comments in Appendix 3 should be taken into account.

Option 1: Torbay Council continues to own and deliver the English Riviera Airshow.

- a) The Airshow remains in its current format and is delivered by an inhouse team (commissioning specialised elements).
- b) The Airshow format is expanded to include ground elements in other areas of Torbay and is delivered by an inhouse team (commissioning specialised elements).
- c) The Airshow format is reduced to a smaller 1-day event with evening entertainment.
- d) The Airshow format is reduced to one afternoon as part of a wider 2/3-day event (e.g. Armed Forces Day, or another themed event).
- e) The Airshow becomes a ticketed event.

Option 1 Considerations:

- Continuation of ownership of the Airshow will require underwriting and financial contribution from Torbay Council.
- The Torbay Council Events team will require increased staffing capacity to meet ambitions.

- The Financial risk (in event of cancellation) will sit with Torbay Council.
- The Air Show is established as part of the UK Air show calendar and benefits from repeat visitors and increases the reputation of Torbay as a destination.
- The feedback from residents in Torbay (especially those in Paignton) shows support and appreciation for the Air Show.
- If the Airshow is reduced to one day sponsorship and trading will be less desirable and may affect income to offset costs.
- Reducing costs to the Council if continuing the Airshow will be dependent on significantly increasing sponsorship.
- For the Air Show to become fully cost neutral a dedicated Airshow Team will need to be resourced.
- It may be possible to introduce a charge for prime viewer locations and some attractions by fencing off certain areas of the site, however one of the key benefits of the Airshow is that it removes barriers to access as it is free to attend, and these options should be carefully considered.

Option 2: Facilitate the provision of the Air Show by another organisation (e.g. not for profit).

Provide support for the establishment of a not-for-profit organisation to own and deliver the Airshow through sharing of professional expertise and knowledge, lessons learned, good practise, event management advice, access to contacts etc and/or a financial contribution from Torbay Council by way of sponsorship.

Option 2: Considerations

- Airshows are being successfully delivered by organisations other than Local Authorities in the UK (e.g. Teignmouth).
- This option could ensure the continuation of economic and social benefits to the residents of Torbay.
- This option would continue to deliver the ambitions of the Event Strategy and
 Destination Management Plan by continuing the provision of a highlight event in the
 event calendar and ensure continuity for repeat visitors.
- The establishment of a not-for-profit organisation would be dependent on interested parties willing to become organisers of the event.

Option 3: Removing the Airshow from the Council's delivery plans and redirecting financial support into other (new) events or attractions across the Torbay event calendar.

Redirecting some or all the Council's financial contribution (£195,000 in 2023) or underwriting other events to extend the Torbay events programme such as:

- An Ice Rink over 4 weeks in December to extend shoulder season (in line with Events Strategy and Destination Management Plan) and support the Bay of Lights attraction.
- A large sporting event, such as a triathlon, promoting Torbay's geopark status and natural landscape.
- Increasing the amount of useable event space through the installation of utilities to prime sites.

Option 3 considerations:

- Supporting other events could deliver a positive economic impact to Torbay across a wider range of dates and increase the length of the visitor season.
- A wider range of events could attract a wider demographic to Torbay.
- The economic impact of new events may or may not equate to the economic impact of the English Riviera Airshow.
- If considered alongside Option 2 the English Riviera could retain the Airshow and the Council could support a wider range of signature or headline events.

Option 4: Remove the Airshow from the Council's delivery plans with no plans to redirect funding.

Option 4 Considerations:

- The Council has committed to the English Riviera (Outdoor) Events Strategy and Destination Management Plans, which includes objectives to support and facilitate a range of signature or headline events with the ability to draw national visitors.
- The economic benefits of the Airshow, or alternative events would not be realised.
- Residents and visitors would no longer benefit from the positive social impacts of the event or alternative events.

8. Financial Opportunities and Implications

8.1 Recommendations to Torbay Council Cabinet made by the Overview and Scrutiny Committee will have financial opportunities and implications. Any decision made by Torbay Council Cabinet will need to be considered during the Council's 2024/2025 budget setting process.

9. Legal Implications

- 9.1 The contract with the current Event Management company expires following the 2023 English Riviera Airshow, therefore there are no legal implications related to contracts.
- 9.2 The Council retains intellectual property rights over all documentation and materials created by the current contractor in relation to the Airshows delivered under the contract.
- 9.3 The legal implications of any decision made by Torbay Council Cabinet will need to be examined following the decision, and Cabinet members advised of any legal implications.

10. Engagement and Consultation

- 10.1 Attendees, both resident and visitors were given the opportunity to complete a survey to give feedback on the 2023 Airshow, and to share their views on the impacts and benefits of the Airshow for the community and local businesses.
- 10.2 Torbay businesses and traders at the event were also given the opportunity to share their views through an online survey.
- 10.3 At the request of the Overview and Scrutiny Board a short survey was conducted via Torbay's Community Partnerships to gain public views on attendance and future of the English Riviera Airshow. A summary of the results of the survey is set out at Appendix 5.

11. Purchasing or Hiring of Goods and/or Services

- 11.1 Elements of the Airshow must be procured as Torbay Council does not have the necessary skills or competencies to provide these services, such as flight programming and air space ground control.
- 11.2 Torbay Council Events Team Officers have the necessary skills to plan and co-ordinate an event of this size, however the staffing capacity in the team would need to be increased for the additional hours and specialisms delivered by the contractor to be delivered in-house.

12. Tackling Climate Change

12.1 Refer to 6.3 and 6.4.

13. Associated Risks

- 8.1 Cancellation of any future Airshow due to poor weather conditions, or other mitigating factors would likely result in the loss a proportion of the Council's investment into an Airshow. Although ground shows could continue, cancellation of the Air displays would significantly reduce any positive economic impact.
- 8.2 The Torbay Airshow is included in the UK Airshow calendar and is established as an annual show and attraction to Torbay, cancellation of the Airshow could impact the national profile of Torbay.
- 8.3 Withdrawing the Airshow from the Torbay events programme without an alternative or alternatives would limit the achievement of the objectives in the English Riviera (Outdoor) Events Strategy and the resulting positive outcomes for the economy and community.
- 8.4 Any direction given by Cabinet on the future of the Airshow, financial contribution or model of delivery will need to be fully assessed for risks and Cabinet members advised of any emerging risks.

Equality Impacts - Identify the potential positive and negative impacts on specific groups

| | Positive Impact | Negative Impact & Mitigating Actions | Neutral Impact |
|-------------------------------------|--|---|----------------|
| Older or younger people | Free to access events remove socio-economic barriers. Opportunities to take part in community events enable intergenerational activities and promote inclusive communities. Large headline events support the wider economy and increase job opportunities and earning potential. | Any alternative events should consider appeal to a wide audience and concessions for tickets for those financially disadvantaged. | |
| People with caring Responsibilities | Free to access events remove socio-economic barriers. Opportunities to take part in | Any alternative events should consider appeal to a wide audience and | |

| | community events enable intergenerational activities and promote inclusive communities | concessions for tickets for those financially disadvantaged. | |
|---|---|---|-----------------------|
| People with a disability | The Airshow provides exclusive accessible viewing areas for those who are disabled and their carers. If alternative events are considered this access for disabled people must be considered. | Ticket concessions for those who are financially disadvantaged could reduce negative impacts of removing nonticketed events from the Torbay Events Programme. | |
| Women or men | Free to access events remove socio-economic barriers. Opportunities to take part in community events enable intergenerational activities and promote inclusive communities | Any alternative events should consider appeal to a wide audience. | |
| People who are black or from a minority ethnic background (BME) (Please note Gypsies / Roma are within this community) | Free to access events remove socio-economic barriers. Opportunities to take part in community events enable intergenerational activities and promote inclusive communities | Any alternative events should consider appeal to a wide audience and concessions for tickets for those financially disadvantaged. | |
| Religion or belief (including lack of belief) | | Any alternative events should consider appeal to a wide audience. | No discernible impact |
| People who are lesbian, gay or bisexual | | Any alternative events should consider appeal to a wide audience. | No discernible impact |
| People who are transgendered | | Any alternative events should consider appeal to a wide audience. | No discernible impact |
| People who are in a marriage or civil partnership | Page | Any alternative events should consider appeal to a wide audience. | No discernible impact |

| Women who are pregnant / on maternity leave | | Any alternative events should consider appeal to a wide audience. | No discernible impact |
|---|---|---|-----------------------|
| Socio-economic impacts (Including impact on child poverty issues and deprivation) | Non ticketed, open events remove socio-economic barriers. Opportunities to take part in community events enable intergenerational and inclusive activities and promote inclusive communities. Headline events with a wide national and international visitor appeal support the economy of Torbay, during the event and raise the profile of Torbay to encourage repeat visits. | | |
| Public Health impacts (How will your proposal impact on the general health of the population of Torbay) | | | No discernible impact |

10. Cumulative Council Impact

- 10.1 In 2021 a decision was made by the Council to invest £750, 000 over three years to implement a new Events Strategy and support wider cultural and heritage activities. This investment period end March 2025.
- 10.2 Any recommendation or decision made should take into account the budgetary requirements for delivering that option and also the need for future investment into the delivery of a vibrant events programme across Torbay.
- 10.3 If a decision is made that Torbay Council will continue to deliver and fund the English Riviera Airshow it would be advisable to consider the ending of the current investment period, and a further investment period.

11. Cumulative Community Impacts

English Riviera Airshow Evaluation 2023

Final report

Page

Commissioned by Torbay Council

Produced by

The South West Research Company Ltd

July 2023



















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English Riviera Airshow Evaluation 2023

Recommendations

















The English Riviera Airshow is one of the first major events in the bay's calendar. The event has taken place over the first weekend in June since 2016 and is typically the first time that the Red Arrows fly in their annual programme. This year the event took place on the 3rd and 4th June 2023. The event is principally located on the seafront in Paignton with the Event Village, Forces Village and Fairground located along the seafront and on Paignton Green.

Torbay Council invests considerable public funds in putting on the event each year and were keen to evaluate and understand the net economic impacts of the air show. They appointed The South West Research Company Ltd. to undertake the economic evaluation of the 2023 Airshow including an on-site face to face survey amongst attendees to the event over the two days, a programme of on site attendee counts, a post event online survey amongst local businesses based in and around Torbay, as well as an online survey amongst suppliers/traders directly involved with the event.

The key findings of the 2023 research were:

Attendance and Economic Impact

- Φ A total of 65,000 visitor days were spent at the event with the total visitor days associated with the event equating to 89,000 (65,000 Airshow Nattendance + other staying visitor days in Torbay away from the event).
- The Saturday was the better attended day of the two Airshow days attracting 36,000 attendees in comparison to 29,000 on the Sunday.
- In 2023 the total gross spend associated with the English Riviera Airshow was £3.5m.
- £1.8m of the total spend is estimated to be new expenditure that would not have occurred without the Airshow taking place. 18% occurred at the event/Paignton seafront (£0.3m) and the local area with the other 82% occurring in the wider Torbay area (£1.5m).
- When further rounds of spending that occurred as a result of the visitor spend are considered, the new visitor spend generated a total of £2.5m in total business turnover in Torbay, supporting 34 FTE jobs and providing an estimated £1.5m in GVA. The investment in the event by Torbay Council returned a very healthy return of £15.56 for every pound invested in addition to the hugely positive impacts demonstrated in this report on visitors, local residents and local businesses. These are impacts that would not have occurred had the Airshow not taken place.

•

Face to Face Survey

- The feedback from event attendees was very positive with 96% being very satisfied or satisfied with their experience and 94% stating that they would be very likely or likely to visit again.
- Overall, there was overwhelming support amongst local residents for the Airshow with 86% agreeing that it brings a sense of local/civic pride to the area and 84% that it is of great importance to the local economy. 66% of local residents disagreed that the event caused unnecessary littering, traffic congestion and pollution to the town.
- 54% of all staying visitors said the Airshow had been the main reason for their choosing to stay in the area.
- 86% of attendees said the Airshow had been the main reason for their visit to Paignton on the day they were interviewed.
- •N 59% of attendees were repeat visitors and knew about the event from a previous visit.
- 61% of attendees had visited the event on one day and 39% on both days. They stayed for an average of 6.11 hours (6 hours and 7 minutes).
- Local residents of Torbay accounted for 53% of all event attendees, followed by 25% who were categorised as staying visitors (22% staying overnight in Torbay at the time of the event and 3% staying in nearby accommodation outside of Torbay) and 22% who were categorised as day visitors from home who lived outside of Torbay.
- 78% of event attendees had visited in an adult only group, whilst 22% of groups contained children.
- 43% of all attendees had travelled to the Airshow by car/van/motorcycle on the day of their interview, 37% had walked to the event with the next most popular mode of transport being a public bus/coach service (12%).

Local Business Survey

- Overall, there was a very high level of support amongst local businesses for the Airshow with 77% agreeing that it brings a sense of local/civic pride to the area. 50% of businesses disagreed that the event caused unnecessary littering, traffic congestion and pollution to the town and 43% agreed that the event was of great importance to their business.
- The large majority of businesses showed support for the event with 76% agreeing that it was of great importance to the local economy and 77% agreeing that it was of great importance to the overall image of the local area.
- Overall, satisfaction levels were relatively good amongst businesses with 63% very satisfied or satisfied with the way the event was run.
- 78% of businesses responding to the survey undertook initiatives for the Airshow. The largest proportion, 67%, recycled all waste where possible.
- 49% of businesses responding to the survey said that the Airshow brings additional visitors/customers to their business which they would otherwise not receive. 30% said their business would still achieve the same numbers of visitors/customers even if the Airshow did not take place and 21% said the event reduces the numbers of visitors/customers to their business when it is taking place. The overall result was a net positive result of 28% (the percentage difference between the proportion of businesses reporting additional visitors/customers and those reporting reduced visitors/customers as a result of the event taking place).
- 43% of businesses reported increased visitors/customers during the Airshow. 37% said their visitor/customers numbers had stayed the same and 20% reported decreased visitors/customers as a result of the Airshow taking place. The estimated overall change in visitors/customers for all businesses was +10%.
- 42% of businesses reported increased turnover during the Airshow. 36% said their turnover had stayed the same and 22% reported decreased turnover as a result of the Airshow taking place. The estimated overall change in turnover was +8% for all businesses.
- 15% of businesses extended their opening hours during the event, 7% increased their prices and 15% increased their staff levels.

Supplier/Trader Survey

- Overall, satisfaction levels were relatively good amongst suppliers/traders with 72% very satisfied or satisfied with the level of business they received, 86% very satisfied or satisfied with their involvement with the festival and the same proportion very satisfied or satisfied with the way the festival was run.
- 86% of suppliers/traders said they would be interested in supplying/trading at the event in 2024.
- Overall, there was a very high level of support amongst the suppliers/traders taking part in the survey for the Airshow with 92% agreeing that it brings a sense of local/civic pride to the area. 71% disagreed that the event caused unnecessary littering, traffic congestion and pollution. 65% agreed that the event was of great importance to their business with 50% (7 businesses) saying that between 1-10% of their anticipated annual turnover is related to their involvement with the Airshow and 7% (1 business) 31-40% of their annual turnover. Page 30

93% of businesses in each case agreed that it was of great importance to the local economy and that it was of great importance to the overall image of the local area.

- 71% of suppliers/traders responding to the survey undertook initiatives for the Airshow. The largest proportion, 64%, recycled waste where possible, 50% didn't use or sell single use plastics, 29% switched off electrics where possible and 7% promoted public transport.
- Staff working at the event and staying in Torbay as a result generated approximately £1,200 of additional spend.
- Additional local staff employed for the event generated approximately £9,000 in local wages.

Conclusions & Recommendations

- All of the evidence contained in this report paints a very positive and healthy picture for the English Riviera show both now and in the future. As with all events there is always room for improvements and the full details of this report and associated appendices should be read in full to fully understand any areas that possibly need to be explored.
- The investment in the airshow made by the council not only provides a very healthy return on investment for the two day event, but also puts Paignton and Torbay on the map and in the media providing free promotion of the resort which undoubtedly will generate a level of interest in visiting the area. In addition attendees, those working on and at the event, local residents and local businesses all value the event highly with the event bringing a sense of local/civic pride in the area and recognised as important for the local economy. As such, as long as the event continues to be well supported and provide a good return on investment it's place in the Torbay event calendar should be assured.
- As noted in this report the attendance estimates for 2023 are lower than previous years, although the previous estimates were for three day airshows rather than the two day event in 2023. As such, the 2023 figure of 65,000 is broadly comparable with the estimate of 100,000 used in the 2016 evaluation report (two thirds of the three day event attendance) and considering this years' event was always likely to see reduced visitor vels due to the cost of living crisis and rail strikes on the Saturday, the attendance estimates should be viewed positively.
- The previous figure of 165,000 attendees that has been used in some cases as the estimated attendance would appear to be an estimate to cover previous three day airshows generated for press/media circulation and looks to build upon previous attendance figures to provide an estimate for the whole Torbay area (including Torquay, Brixham, Goodrington etc.) rather than the airshow site focussed estimates provided in this report.
- What this report cannot estimate, if it is an actual issue, is how many potential day and staying visitors don't come to the area because the airshow is on. There will be people for whom the event holds no appeal, but it's also possible that people are put off by the estimated attendance figures previously used (165,000) and avoid the area for fear of overcrowding and congestion issues. Media outlets used pictures of packed beaches and walkways in their pre-event promotion and those identical pictures could most certainly also be taken in 2023, but they were for sections of the site rather than the site overall. Whilst certain areas became more congested when displays were on this left other areas of the site relatively quiet. It was possible to walk around the site quite easily throughout the event and the busier areas were just certain areas and did not represent activity across the whole site. Food, drink and toilets were all relatively easily accessed by our team working on site across the weekend and access in and out of Paignton was also relatively trouble free. Perhaps a slightly different promotional push in future years presents an opportunity to increase visitors to the event? Rather than promoting how many watch the Airshow across Torbay, the promotion of the capacity and the excellent facilities of the event site and the fact that this hasn't been an overcrowded event may attract more people?

Conclusions & Recommendations

- In a similar approach it may also be worth promoting alternative places where the Airshow can be observed away from the main event area at Paignton which would also encourage others to visit. Indeed, perhaps an extension of the display area and Airshow related activities across Torbay would not only offer opportunities to increase numbers but also help to spread event spend across the area and reduce the impact of the displacement of spend caused by the event. Whilst displaced business has been accounted for in the economic estimates it would certainly appear that displacement of spend takes place in Torquay and Brixham while the event is on and is most likely to occur amongst attractions, food and drink and retail businesses. Some accommodation businesses also suggested that the event caused a negative impact on their business, however, with the majority of business reporting increased or similar levels it's likely that this is more of an individual issue with some businesses and perhaps the council could be working with those businesses to increase their levels during the event. It's inevitable that events with a relatively narrow area of geographical focus will always cause displacement of spend, but business comments suggest more could be done to make this more inclusive across Torbay overall and in reality just offers the opportunity to increase attendance.
- Whilst some displacement of spend is acknowledged it should also be noted that the majority of new spend created by the event is generated by aying visitors so will also be more widely spread across Torbay than actual spend at the event itself.
- With regards to timings of the event, local business data and historical occupancy data suggests that there is capacity to accommodate the additional staying visitors brought to the area by the airshow and indeed the potential to increase further. As such there are no major issues connected with the event timings although there are some suggestions raised by local business regards this to consider.
- Lastly, we would always recommend that research should be a vital component of future airshows to monitor and compare key measures over time such as attendance, visitor and business satisfaction and also the success of any further event related local initiatives in the future. Research into these areas will ensure that monies are invested wisely.

English Riviera Airshow Evaluation 2023

Introduction

















Introduction

The English Riviera Airshow is one of the first major events in the bay's calendar. The event has taken place over the first weekend in June since 2016 and is typically the first time that the Red Arrows fly in their annual programme. This year the event took place on the 3rd and 4th June 2023. The event is principally located on the seafront in Paignton with the Event Village, Forces Village and Fairground located along the seafront and on Paignton Green.

Torbay Council invests considerable public funds in putting on the event each year and were keen to evaluate and understand the net economic impacts of the air show. Without the event the English Riviera would expect be busy at this time of year, so the council need to understand the additional impact that the event brings over and above the regular visitor economy.

Torbay Council appointed The South West Research Company Ltd. to undertake the economic evaluation of the 2023 event including an on-site face to face survey with attendees to the event over the two days of the event, a programme of on site attendee counts, a post event online survey amongst local businesses based in and around Torbay, as well as an online survey amongst suppliers/traders directly involved with the event.

The specific objectives of the 2023 research were:

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- To estimate, through a programme of visitor counts and the use of secondary data sources where available, the number of visitors by different categories to the English Riviera Airshow 2023 over the two days of the event.
- To calculate, through a programme of visitor interviews, the expenditure per visitor and the additionality effect (i.e. the proportion of trips to the resort generated specifically by the event which otherwise would not have taken place).
- To produce, through simple modelling, the overall volume and value generated by the event and an estimate of direct, indirect and induced spend leading to overall GVA and employment impact.
- To provide, through visitor interviews, profiles of both the type of visitor and the nature of the trip, plus satisfaction levels with the event.
- To ascertain, through an online questionnaire with local businesses in the resort and suppliers and traders at the event, the impact that the air show has on the turnover and operation of retail, tourism and other commercial businesses.

Methodology

The methodology for the evaluation comprised of the following key components:

1. Face to face attendee surveys

A face to face survey amongst a sample of 349 attendees to the event was undertaken over the two days in Paignton. Interviews were conducted by fully experienced fieldworkers operating under MRS guidelines with attendees approached on a random basis as they moved through the area allocated to the interviewer. The survey explored visitor and visit characteristics, whether the Airshow was the main reason for their visit to Torbay and their spending patterns. The survey also explored attendees' views and opinions of the event.

2. <u>Post-event online attendee surveys</u>

Page 3

In addition, an online version of the attendee survey was also set up and the link distributed to car park ticket purchases and promoted on the event website and all social media channels during and after the event. A total of 261 online responses were received by the closing date of the 16^{th} June – 247 of whom had attended the Airshow. When the face to face surveys (349) and online attendee submissions (247) were combined, a total sample of 596 Airshow attendees was used for analysis purposes.

Please note: All sample surveys are subject to statistical error. The size of this error varies with the sample size and also with the order of magnitude of the research findings being considered. The figures shown below are at the 95% confidence limits. Thus, for example, we can be 95% certain that, for all visitors, with a result of 50%, the true percentage is the range 46% to 54%.

| Research findings | All visitors |
|-------------------|--------------|
| Sample size: | 596 |
| 10% or 90% | +/- 2.4 |
| 20% or 80% | +/- 3.2 |
| 30% or 70% | +/- 3.7 |
| 40% or 60% | +/- 3.9 |
| 50% | +/- 4.0 |

Methodology

3. Local Business Survey

In addition to the face to face attendee surveys, an online business survey amongst local businesses in Torbay and the surrounding area was also conducted. The questionnaire focused on their trading patterns and the impact of the event upon their staffing and turnover. The link was distributed through the key business sector groups that are co-ordinated by Torbay council and the English Riviera BID Company during June 2023 with reminder emails sent to all non-respondents until the survey was closed on the 27th June. A total of 249 responses to the survey were received by this closing date.

4. Supplier/Trader Survey

An online survey amongst traders/suppliers at the English Riviera Airshow 2023 was also conducted to explore areas such as the impact of the event on business turnover, staffing levels and any suggested improvements to the event. Data was captured using an online survey, the link to which was circulated via email by Richmond Event Management to all those working at the event. A total of 14 responses were received by the closing date of the 10th July 2023, however, there wasn't a large amount of traders working at the event with some businesses having multiple outlets. This also doesn't include local businesses already operating within the event site.

5. <u>Daily visitor counts</u>

A programme of daily visitor counts were conducted during both days of the event to provide the basis to calculate an estimate of the total number of people in attendance each day. With a team of five people counts were conducted across the whole seafront area at similar time periods over both of the event days. The ability to conduct counts across the site at the same time was important as it reduced the likelihood of double counting as people moved around the site prior to the event and to capture time periods during displays when site movement was at its lowest. The site was split into sections as provided by the event organisers (REM) and full site counts conducted prior to the event taking place, during the opening displays, during the mid-afternoon displays with further section checks conducted when the Red Arrows were flying to estimate the crowd boost caused by their appearance. The estimated capacities of each section were provided by REM which allowed us to sense check estimates alongside anecdotal data and photographs taken at the event. The attendance estimates provided in this report have also been sense checked against other data collected through the survey such as official Airshow parking data and programme sales data.

Methodology

6. Economic impact modelling

Using data derived from each of the previously mentioned components to estimate the overall economic impact of the English Riviera Airshow 2023 on the local economy. It should be noted that whilst the data from the visitor surveys has been used in the economic impact modelling in some cases it has been necessary to segment and analyse the data differently than the overall approach displayed in the visitor survey results. This has been necessary to enable a daily picture of the event to be built, look at unique visits to the event and to separate out the different impacts of the attendee types for the event to get a more robust level of outputs.

English Riviera Airshow Evaluation 2023

Attendance and Economic Impact













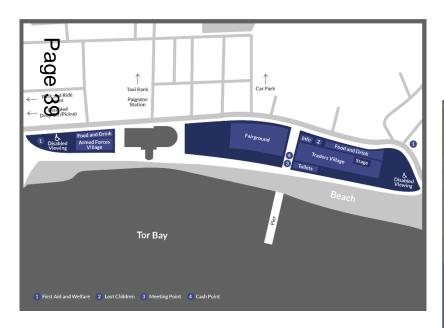




How was the event attendance calculated?

The English Riviera Airshow attendance estimates contained within this section are based upon a series of actual counts conducted across key areas of the event site (see site map below) and also including Paignton Harbour and Preston Sands. From the outset it should be acknowledged that obtaining a fully accurate count at any event is extremely difficult unless it is a ticketed one with restricted entry and exit points. The size and very open nature of the English Riviera Airshow site means that whilst every effort has been made to make attendance estimates as robust as possible, they should be viewed as informed estimates of the likely attendance. However, the estimates provided are supported by other data sources as detailed in the methodology section.

Full visitor counts were undertaken across the whole site on each day of the event including counts pre-display, during the first display, during the afternoon display and with further section counts conducted during the Red Arrows display. The final estimates represent attendance at the peak time of day.



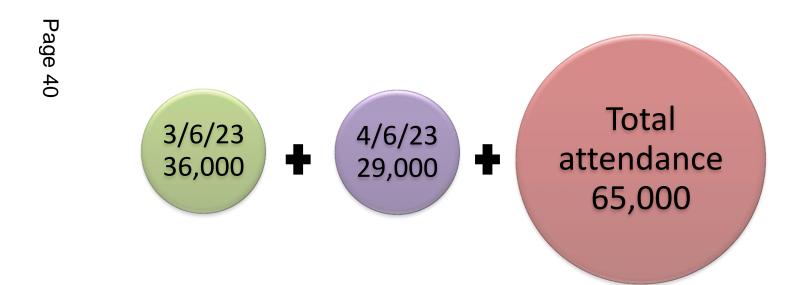


How many people attended the event?

The breakdown of the English Riviera Airshow 2023 attendance is shown below for both days of the event and the two days combined.

The figures represent all attendance at the event at the peak time of the day (65,000) although some people attended the event on both days so the number of unique people generating this total attendance over both days was 52,200.

Included in the above, approximately 10,400 unique staying visitors in Torbay generated 14,300 visitor days at the event. Staying visitors stayed in the local area for a longer period generating a further 24,000 visitor days. In total this equates to 38,300 staying visitor days spent in the local area by those attending the Airshow (14,300+24,000) and the total visitor days associated with the event equating to 89,000 (65,000 Airshow attendance + other staying visitor days away from the event).



How was the spend generated by the event calculated?

Using visitor spend data gathered through the face to face survey alongside count estimates and data from the face to face, local business and supplier/trader surveys the following process was followed to reach the new spend figure which is the amount of expenditure that would not have occurred without the event taking place.

1. Calculate gross spend

All spend generated by those attending the event both at the event and away from the event regardless of whether the event was the reason for their visit and including all staying visitor spend for their entire stay.

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2. Calculate additional spend (subset of 1)

All spend generated by staying visitors for whom the event was the main reason for their entire stay (whole stay included) or for visitors for whom the event was their reason for visiting on the day of their visit (all day spend included).

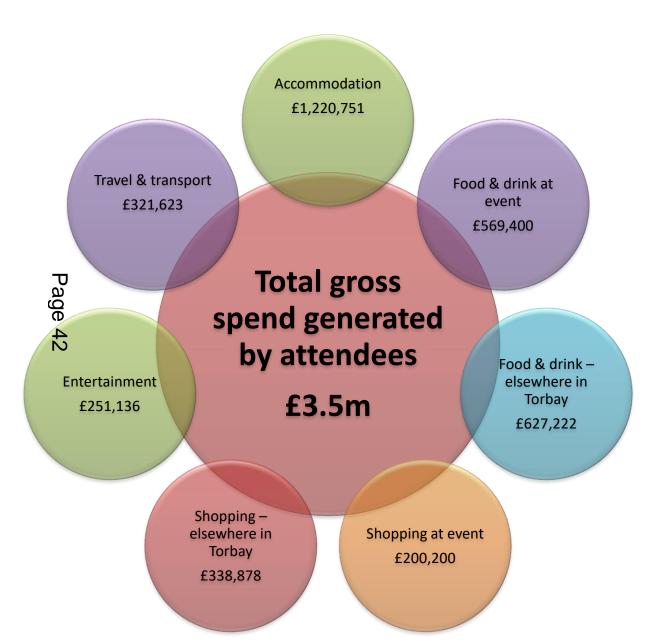
3. Removing what would have happened anyway and leakage

Reductions made to remove those that would have been spending money in Torbay anyway, reduction in spend at the event to account for origin of traders and leakage out of area.

4. Calculate new spend (subset of 2)

Following the process above this is the amount of new expenditure that has occurred as a result of the event taking place. New spend figures are entered into the Cambridge Model to estimate additional rounds of spending (indirect and induced), employment supported and GVA.

How much was spent in Torbay by those attending the Airshow?



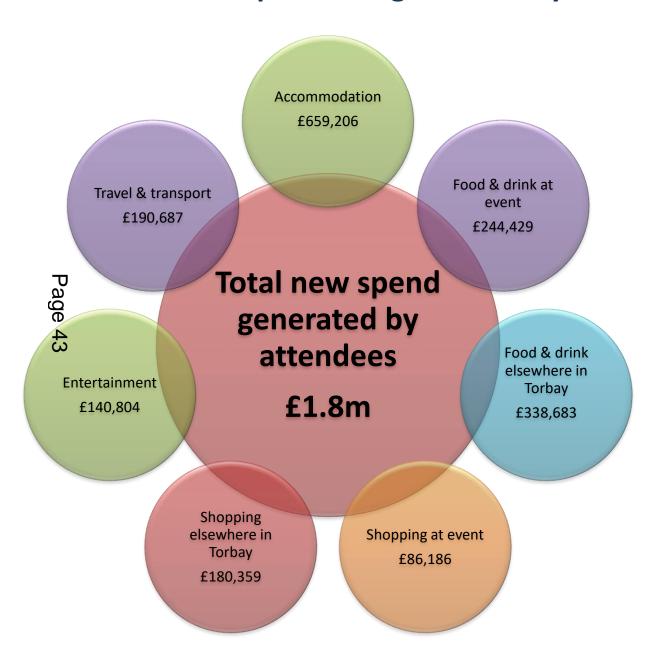
The diagram shows the total gross spend by all those attending the event and includes all spend at the event/Paignton seafront and elsewhere in Torbay on the day of visit plus staying visitor spend in Torbay for the entire length of their stay. Attendees also spent money on event programmes (approximately £5,400) but this has not been included in the spend data as the revenue is used to fund future airshows.

In 2023 the total gross spend associated with the English Riviera Airshow was £3.5m.

Of the £3.5m gross spend approximately 22% occurred at the event/Paignton seafront (£0.8m) with the other 78% occurring in the wider unitary authority area (£2.7m)

The majority of gross spend associated with the Airshow was generated by visitors staying in Torbay (72%), 17% was generated by Torbay residents and 11% generated by day visitors to the event.

How much new spend was generated by Airshow attendees?



The diagram shows the total of new spend generated by all those attending the event after reductions have been made to account for deadweight, displacement and leakage.

This is the total direct visitor expenditure that would not have occurred without the Airshow taking place.

In 2023 the total new spend associated with the Airshow was £1.8m..

Of the £1.8m new spend approximately 18% occurred at the event/Paignton seafront (£0.3m) and the local area with the other 82% occurring in the wider Torbay area (£1.5m).

The majority of new spend associated with the Airshow was generated by visitors staying in Torbay (69%), 15% was generated by Torbay residents and 15% generated by day visitors to the event.

For details of the reductions made in calculating the amount of new spend see page 65 of this report.

Final adjustments made to spend and modelling terms used

The estimates of new visitor spending were then fed into the Cambridge Model which generates estimates of total spending in five business sectors (accommodation, retail, catering, attractions/entertainment and travel and transport). Visitor expenditure in each sector represents additional turnover for businesses in those sectors. However, evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover. In particular, some expenditure on food and drink actually takes place in inns and hotels that fall into the accommodation sector and at attractions. The turnover for each business sector has therefore been adjusted to take account of these marginal changes. More significantly, expenditure on travel costs associated with individual trips is as likely to take place at the origin of the trip as it is at the actual destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

Business turnover subsequently arises as a result of visitor spending at the event, from the purchase of supplies and services locally by businesses in receipt of visitor spending (indirect spending) and as a result of the spending of wages by employees whose jobs are directly or indirectly supported by tourism spending (induced spending).

Daddition to this further new spending took place in the local area through the awarding of contracts to local businesses to provide services that enabled the event to take place (approximate value of £133,000) and through out of area businesses working on the event sub-contracting to local businesses (approximate value £9,000). Further induced spending in the local area was also likely through the employment of additional local area staff for the event which generated approximately £9,000 in local wages and through staff working at the event staying in the local area (approximate value £1,200).

Having identified the value of turnover generated by visitor spending in each business sector it is possible to estimate the employment associated with that spending using local wage data and an also to estimate the value of local GVA using the Cambridge Model.

The summary outputs for the final economic impacts calculated through the above method are shown overleaf and estimate that in total the new visitor spend generated a total of £2.5m in total business turnover in Torbay, supporting 34 FTE jobs and providing an estimated £1.5m in GVA. The investment in the event by Torbay Council returned a very healthy return of £15.56 for every pound invested in addition to the hugely positive impacts demonstrated in this report on visitors, local residents and local businesses. These are impacts that would not have occurred had the Airshow not taken place.

What were the total impacts that came from the new spend?

Spend impacts

ge

Adjusted direct visitor spend £1.8m

Indirect and induced spend £0.8m

Total business turnover supported £2.5m

Estimated FTE employment supported 34

Other event related impacts

Local contracts awarded for event Pa

£133,000

Local sub contracts awarded by event suppliers £9,000

Local additional staff wages and traders staying in local area

£10,200

Total other event related impacts £152,200

Total event related new spend £2.7m

Total return on investment

A) Total Airshow cost £283,000

B) Total Airshow income generated £110,000

Total Airshow investment (A-B) £173,000

Total return per pound invested (Total event related spend/total **Airshow investment)**

£15.56

English Riviera Airshow Evaluation 2023

Face to Face Survey Results

















Who visited the event?

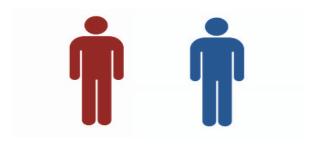
The majority of attendees were local residents of Torbay (53%). 25% of event attendees were categorised as staying visitors, including 22% staying overnight in Torbay at the time of the event and 3% staying in nearby accommodation outside of Torbay (classified as day visitors for economic evaluation purposes). Day visitors from home who lived outside of Torbay accounted for 22% of all attendees.

Staying overnight outside of Torbay, 3% Staying overnight Torbay, 22% A local resident of Torbay, 53%

On a day trip from home living outside of Torbay, 22%

78% of event attendees had visited in an adult only group, whilst 22% of groups contained children. Those staying overnight outside of Torbay (39%) had the highest proportion of adults who had visited with children.

The average group size was 1.73 people.



78% adult only groups



22% adults visiting with children

What was the group composition and age group profile of the attendees?

61% of attendees visited the event in a family and/or friends group with or without children, 29% visited in a couple with their spouse/partner including 42% of those staying overnight in Torbay and 10% attended the event on their own including 12% in each case of local residents and those on a day trip from home living outside of Torbay.

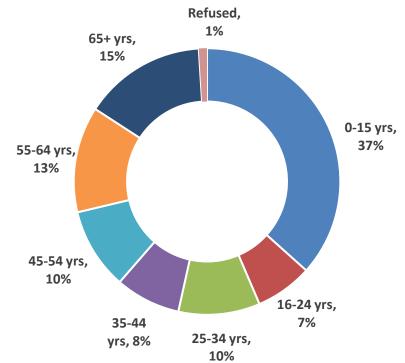
37% of event attendees were children aged 0-15 years. 25% of attendees were aged 44 years or under including 7% aged 16-24 years, 10% aged 25-34 years and 8% aged 35-44 years. 38% of attendees were aged 45+ years including 10% aged 45-54 years, 13% aged 55-64 years and 15% aged 65+ years.

61% family/friends group with or without children

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29% spouse/partner 10% alone

88% of attendees were male and 12% were female. (Please note that these results for age and gender are calculated from the face to face survey responses only).

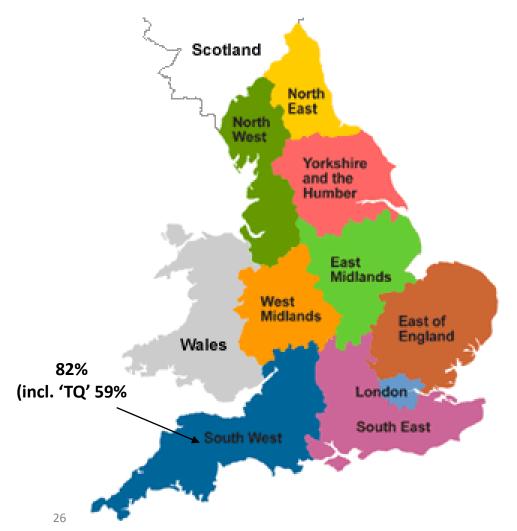


How far did the event reach?

82% of all attendees (who provided their postcode details) were South West residents including 59% who lived in the Torquay (TQ) postal code area. In the wider Devon area, 8% lived in the Exeter (EX) postal code area and 5% in the Plymouth (PL) postal code area.

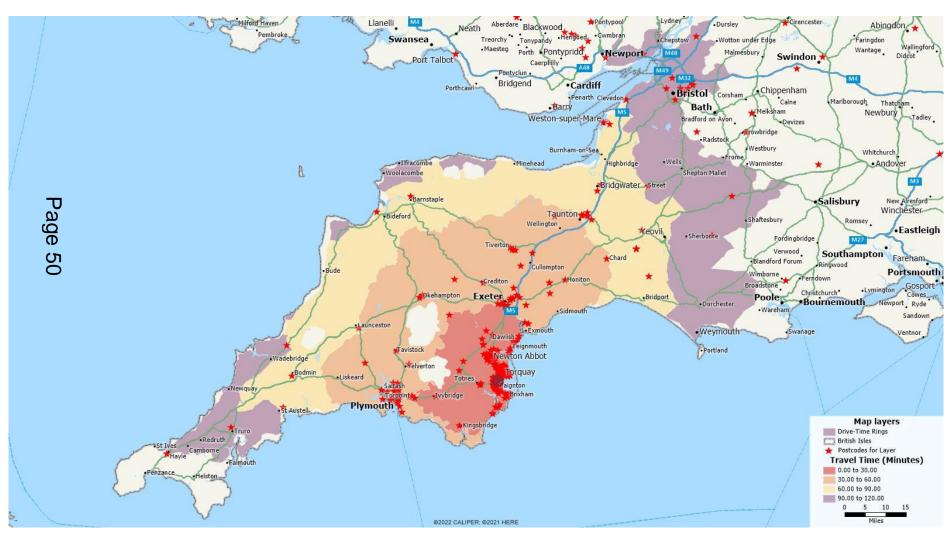
18% of event attendees lived elsewhere in the UK including 2% who lived in postal area 'NP' Newport. There were only 2 overseas visitors captured through the 2023 survey. 1 lived in Australia and the other in South Africa.

| Postal code area | | |
|---------------------|------------------------------------|-----|
| TQ | Torquay | 59% |
| EX | Exeter | 8% |
| PL | Plymouth | 5% |
| TA | Taunton | 3% |
| BS | Bristol | 2% |
| \$96 | Newport | 2% |
| Ø. | Gloucester | 1% |
| ₽ 9 8A | Birmingham | 1% |
| вА | Bath | 1% |
| DY | Dudley | 1% |
| LE | Leicester | 1% |
| SN | Swindon | 1% |
| WR | Worcester | 1% |
| CV | Coventry | 1% |
| M | Manchester | 1% |
| MK | Milton Keynes | 1% |
| NN | Northampton | 1% |
| ОХ | Oxford | 1% |
| RG | Reading | 1% |
| RH | Redhill | 1% |
| TR | Truro | 1% |
| ws | Walsall | 1% |
| | Other UK postcode areas (<1% each) | 9% |



What was the drive-time catchment for the event?

The map below displays the main concentrations of visitor origins for the English Riviera Airshow 2023 including 30 minutes' drive-time bands of the event up to 2 hours. The map clearly shows the high concentration of visitors to the event from within Devon itself.



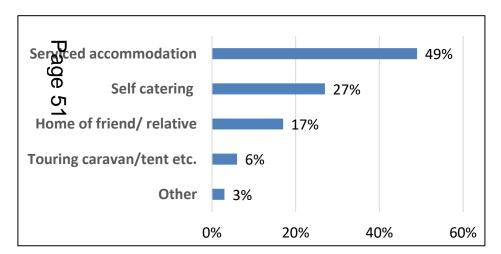
How big a draw was the event for staying visitors and what were the characteristics of their overnight visit to Torbay?



54% of all staying visitors said the Airshow had been the main reason for them choosing to stay in Torbay.



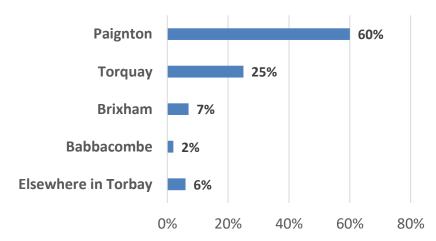
46% not main reason for choosing to stay overnight in the area.



49% had used serviced accommodation including 29% staying in a hotel and 20% a B&B/guesthouse. 27% had stayed in self catering accommodation (house/flat/cottage or static caravan/chalet), whilst 17% had stayed in the home of a friend/relative. 6% had stayed in a touring caravan/tent etc. and 3% had used another type of accommodation.

All attendees staying outside of Torbay were staying in other locations in Devon.

60% of attendees who were staying overnight in Torbay whilst attending the Airshow had stayed in accommodation in Paignton and 25% in Torquay. 7% stayed in Brixham and 2% in Babbacombe. 6% said they stayed elsewhere in Torbay.



The average length of stay was 3.69 nights and the average spend per person per night was £31.91



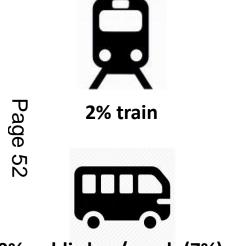
Average spend per person per night £31.91

How did staying visitors travel to Torbay?



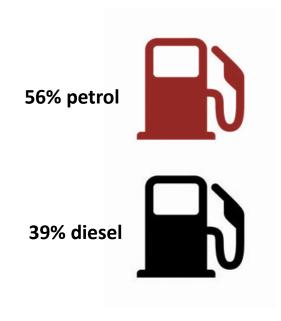
86% of all staying visitors had used a car/van/motorcycle for the longest part of their journey to the area where they were staying in Torbay.

The next most popular mode of transport amongst staying visitors was a public bus/coach service (7%) or tour/excursion bus (2%), followed by the train or a plane (2% each). 1% had arrived by another mode of transport.



9% public bus/coach (7%) or tour/excursion bus (2%)





5% electric (incl. hybrid)



Staying visitors who had arrived in Torbay by car/van/motorcycle were asked what type of fuel their vehicle used.

56% of vehicles used petrol, 39% diesel and 5% electric.

Average miles travelled (all modes of transport) was 172.

The average number of miles travelled to get to Torbay for all modes of transport combined was 172 miles.

How big a draw was the event on the day of visit and would they have been going out anyway?

Excluding staying visitors for whom the festival was the main reason for them choosing to stay overnight in the area, 86% of all other attendees said the Airshow had been the main reason for their visit on the day they were interviewed including 89% of local residents, 95% of day visitors, 52% of those staying overnight in accommodation in Torbay and 78% of those staying outside of the resort.

42% of all attendees said they would not have taken a leisure day out in Paignton/Torbay on the day they attended the Airshow if it hadn't been taking place including 42% of local residents, 56% of day visitors, 13% of those staying overnight in accommodation in Torbay and 33% of those staying outside of the resort.

86% main reason for visit on the day of interview

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14% not main reason for visit on the day of interview





42% would not have taken a day out anyway in Paignton/Torbay if the Airshow had not been taking place

46% of all attendees said they would have been taking a leisure day out in Paignton/Torbay on the day they were interviewed regardless of whether the Airshow had been taking place or not including 43% of local residents, 33% of day visitors, 80% of those staying overnight in accommodation in Torbay and 61% of those staying outside of the resort.

46% would have taken a day out anyway in Paignton/Torbay if the Airshow had not been taking place

13% were unsure whether they would have been taking a day out anyway or not.

How did attendees travel to Paignton for the Airshow?





43% car/van/motorcycle (15% had purchased an official car parking ticket for the event).





37% on foot

12% public bus/coach



1% bicycle 1% boat

4% train

2% other

For 43% of all attendees the main form of transport they had used for the longest part of their journey to Paignton seafront on the day they visited the Airshow was a car/van/motorcycle. 15% of all attendees had purchased an official car parking ticket for the event.

37% of attendees had walked to the event including 50% of local residents and 48% of those staying overnight in accommodation in Torbay. At 12%, the next most popular mode of transport was a public bus/coach service. 4% of attendees arrived by train and 1% in each case by bicycle or boat. 2% had arrived by another mode of transport including a taxi or got a lift.



All attendees who had arrived in Torbay by car/van/motorcycle were asked what type of fuel their vehicle used.

36% diesel

59% of vehicles used petrol, 36% diesel and 5% electric.



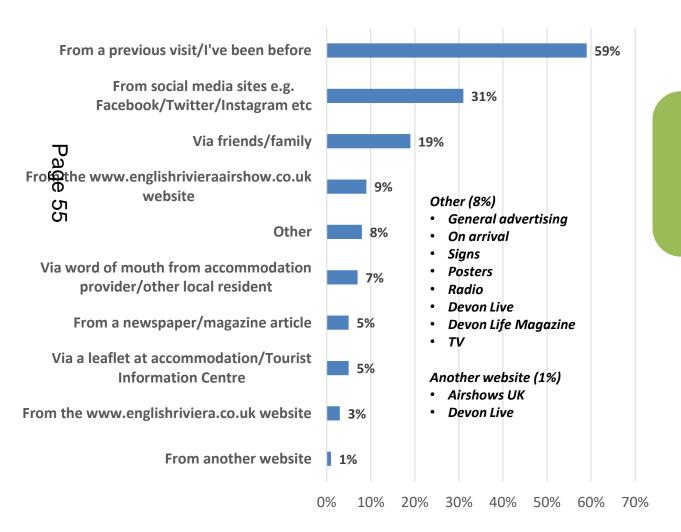
Average miles travelled to the event site on the day of visit (all modes of transport) was 16.



The average number of miles travelled to the event site on the day of visit for all modes of transport combined was 16 miles.

How did attendees find out about the Airshow, how many days did they attend and how long did they spend on site?

Attendees were asked how they knew (or heard) about the Airshow prior to or during their visit. By far the largest proportion (59%) were repeat visitors and had been before including 72% of local residents, 52% of day visitors and 39% in each case of those staying overnight in accommodation in Torbay and those staying outside of the resort. 31% had found out/heard about the event from social media sites and 19% via friends/family.



61% attended 1 day

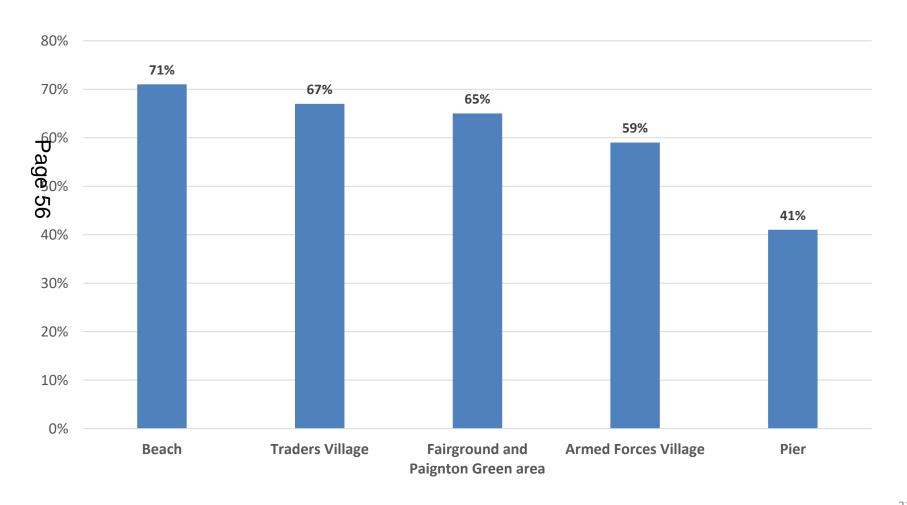
39% attended both days (55% of those staying overnight in Torbay)

Average hours spent at the event 6.11 (6 hours 7 minutes)

Which areas of the site did attendees visit?

Attendees were asked which areas of the site they had visited during their time at the Airshow.

The largest proportion (71%) had been to the beach followed by 67% who had been to the Traders Village, 65% the Fairground and Paignton Green area and 59% the Armed Forces Village. 41% had visited the Pier.



How was attendees' experience of the event?

The feedback from event attendees reported a very positive experience with high levels of enjoyment.



80% very satisfied 6% satisfied

3% neutral

1% dissatisfied (3 attendees)

Overall, 80% of attendees stated that they were 'very satisfied' with their visit to the English Riviera Airshow and 16% that they were 'satisfied'. 3% were 'neither satisfied nor dissatisfied' with their visit and just 1% were 'dissatisfied' with their visit (3 attendees).

There was little variation in levels of satisfaction amongst the different visitor types.

High levels of satisfaction with the event are further supported by the 94% of event attendees who stated that it was 'very likely' (83%) or 'likely' (11%) that they would visit the Airshow again.



9 in 10 would visit again

Only 2% said it was 'unlikely' they would visit the Airshow again including 6% of attendees staying outside of Torbay.

How do local residents feel about the event?

The 2023 Airshow research obtained local resident attendees' agreement levels with a number of statements regarding various aspects of the event. Each factor, or indicator, was rated on a scale of '1' to '5' scale where '1' = 'Strongly agree', '2' = 'agree, '3' = 'neutral', '4' = 'disagree' and '5' = 'disagree strongly'.

Overall, there was overwhelming support amongst local residents for the Airshow with 86% agreeing that it brings a sense of local/civic pride to the area and 84% that it is of great importance to the local economy. Two thirds of local residents disagreed that the event caused unnecessary littering, traffic congestion and pollution to the town.

"This event brings about a sense of local/civic pride in the area"

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the area

"This event causes unnecessary littering, traffic congestion and pollution"

 \bigcirc





86% strongly agree/agree

3% neutral

12% disagree/ strongly disagree







19% strongly agree/agree

15% neutral

66% disagree/ strongly disagree

"This event is of great importance to the local economy"



84% strongly agree/agree



ongly 3% neutral



13% disagree/ strongly disagree

How much did event attendees spend?

Attendees were asked how much they had spent on a number of different categories during their visit to the event/Torbay and an average spend per person per day figure was calculated. Average spend was highest on food & drink at the actual event/Paignton seafront, followed by spending on food & drink in Torbay.





Ave. spend per person on Food & drink
AT EVENT/PAIGNTON SEAFRONT





Ave. spend per person on Food & drink ELSEWHERE IN TORBAY

Spending on shopping at the event/Paignton seafront and in Torbay were the next two highest spend categories.





Ave. spend per person on Shopping AT EVENT/PAIGNTON SEAFRONT





Ave. spend per person on Shopping ELSEWHERE IN TORBAY

How much did event attendees spend?





Other entertainment/activities Ave. spend per person





Travel & transport in Torbay incl. parking Ave. spend per person

English Riviera Airshow Evaluation 2023

Rocal Business Survey Results















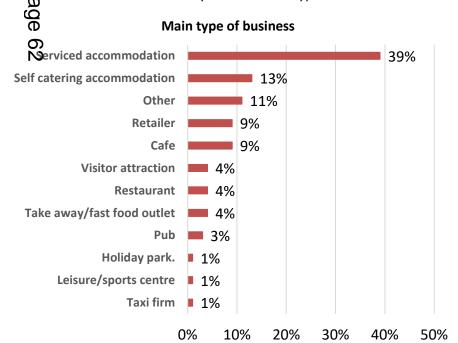


What was the type and location of businesses responding?

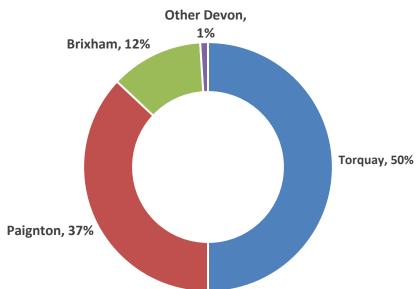
An online business survey amongst local businesses in Torbay and the surrounding area was also conducted. The questionnaire focused on their trading patterns and the impact of the Airshow upon their staffing and turnover. The link was distributed through the key business sector groups that are co-ordinated by Torbay council and the English Riviera BID Company during June 2023 with reminder emails sent to all non-respondents until the survey was closed on the 27th June. A total of 249 responses to the survey were received by this closing date and 92% of these operated during the Airshow. Please note however, that when this data is analysed by location and main type of business the sample sizes are much lower and should be interpreted with caution. 96% were independent businesses, 3% were part of a national chain and 1% were part of a regional or county-wide chain.

39% of businesses were serviced accommodation providers and 13% ran a self catering business. 9% in each case were a retail business or café. 4% in each case were a visitor attraction, restaurant or take-away/fast food outlet. 3% were a pub and 1% in each case were a holiday park, leisure/sports centre or taxi firm. 11% said they were another type of business.

50% of businesses were based in Torquay, 37% in Paignton and 12% in Brixham. 1% of businesses were from other areas of Devon outside of the Torbay Council area.



Location where business is based

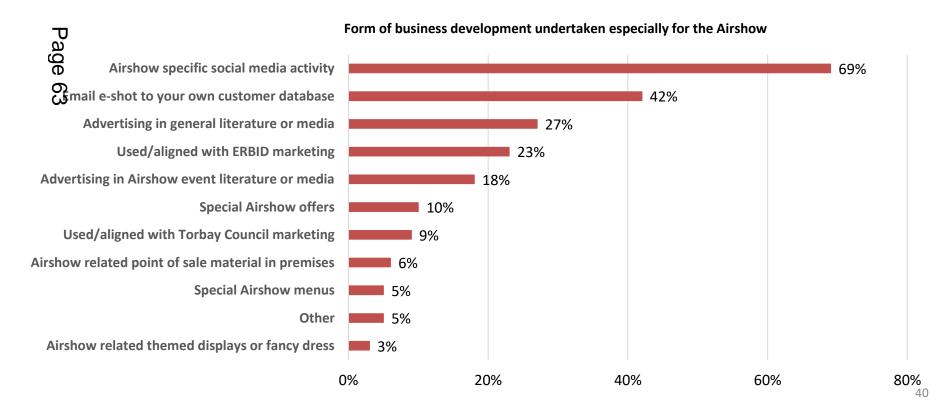


Did businesses undertake any form of business development especially for the Airshow?

34% of businesses said they did undertake some form of business development especially for the Airshow. 69% of these businesses undertook Airshow specific social media activity and 42% did an email e-shot to their own customer database.

27% advertised in general literature or media, 23% used/aligned with the ERBID marketing and 18% advertised in the Airshow event literature or media. 10% did special Airshow offers and 9% used/aligned with the Torbay Council marketing. 6% had Airshow related point of sale material in their premises and 5% offered special Airshow menus. 3% did Airshow related displays or fancy dress.

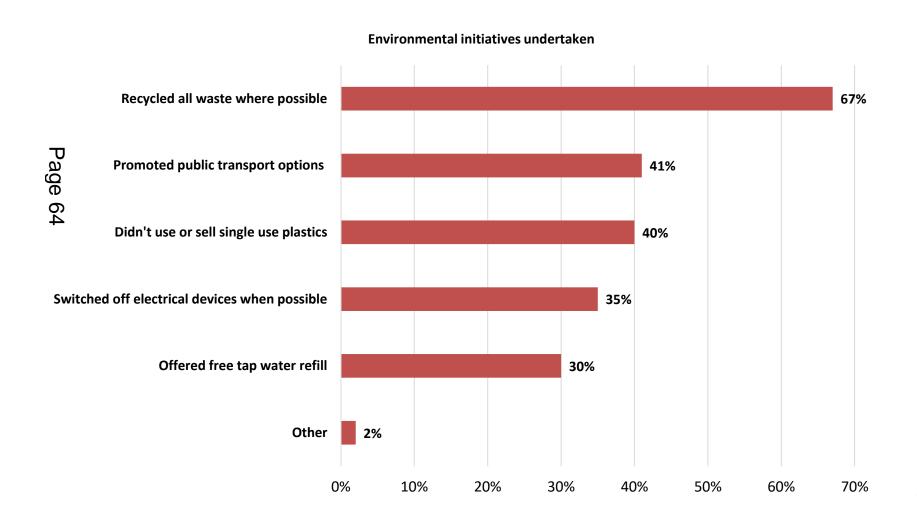
5% said they did some other form of business development especially for the Airshow.



What environmental initiatives were undertaken?

78% of businesses responding to the survey undertook environmental initiatives for the Airshow.

The largest proportion, 67%, recycled all waste where possible. 41% promoted public transport, 40% didn't use or sell single use plastics, 35% switched off electrics where possible and 30% offered free tap water refills. 2% did something else.

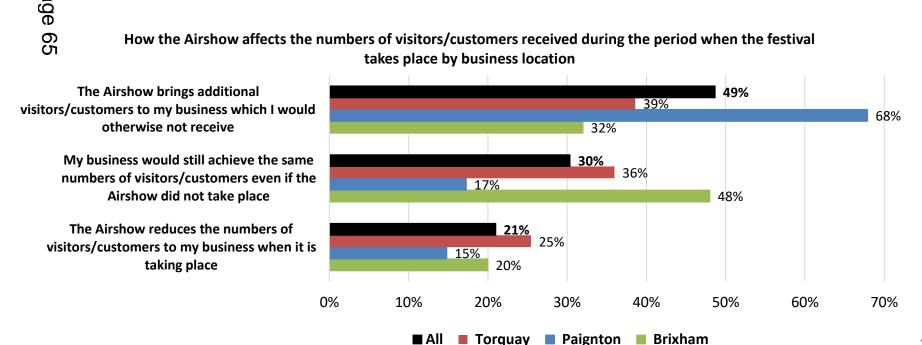


How the Airshow affects visitors/customers received during the period when the festival takes place by location?

49% of businesses responding to the survey said that the Airshow brings additional visitors/customers to their business which they would otherwise not receive with this proportion increasing to 68% of Paignton businesses.

30% said their business would still achieve the same numbers of visitors/customers even if the Airshow did not take place, increasing to 48% of Brixham businesses and 36% based in Torquay. 21% of all businesses said the event reduces the numbers of visitors/customers to their business when it is taking place increasing to 25% of Torquay businesses and 20% based in Brixham.

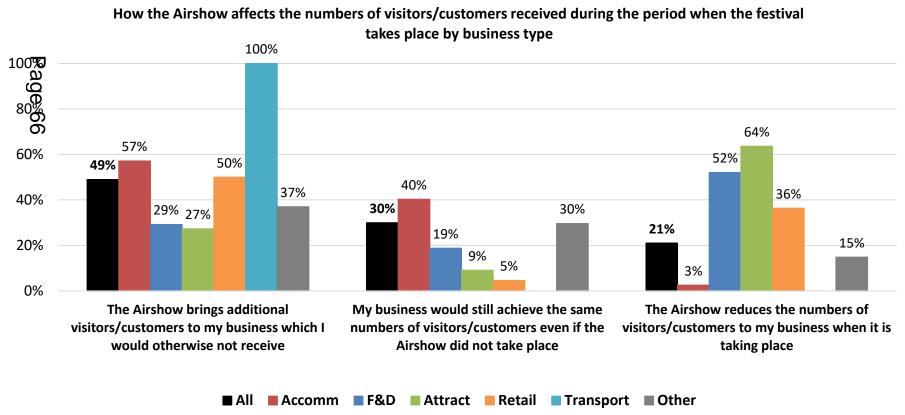
The overall result was a net positive result of 28% including 13% for Torquay businesses, 53% for Paignton businesses and 12% for Brixham businesses (the percentage difference between the proportion of businesses reporting additional visitors/customers and those reporting reduced visitors/customers as a result of the event taking place).



How the Airshow affects visitors/customers received during the period when the festival takes place by type of business?

57% of accommodation businesses responding to the survey said that the Airshow brings additional visitors/customers to their business which they would otherwise not receive whilst 40% said their business would still achieve the same numbers of visitors/customers even if the Airshow did not take place. Just 3% said the event reduces the numbers of visitors/customers to their business.

64% of visitor attraction businesses said the event reduces the numbers of visitors/customers to their business when it is taking place.

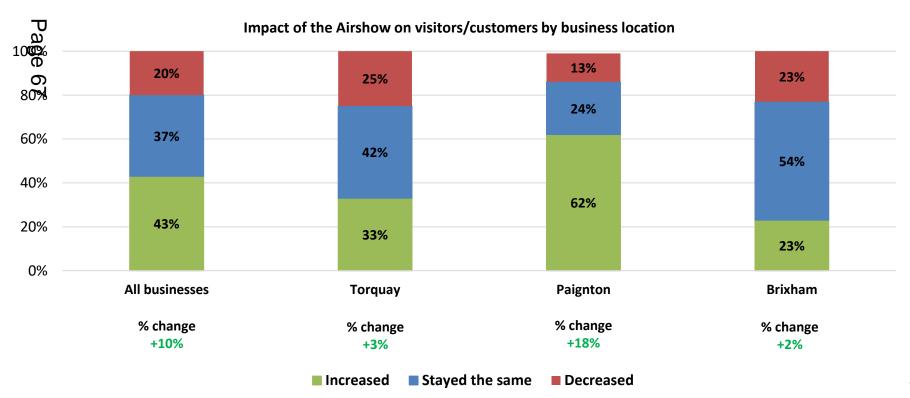


What was the impact of the Airshow on the number of visitors/customers by location?

43% of businesses reported increased visitors/customers during the Airshow with this proportion increasing to 62% of Paignton businesses.

37% said their visitor/customers numbers had stayed the same (54% and 42% of Brixham and Torquay businesses respectively) and 20% reported decreased visitors/customers as a result of the Airshow taking place including 25% of Torquay businesses, 23% of those based in Brixham and 13% of Paignton businesses.

The estimated overall change in visitors/customers for all businesses was +10% increasing to +18% for Paignton businesses and decreasing to +3% and +2% for Torquay and Brixham businesses respectively.

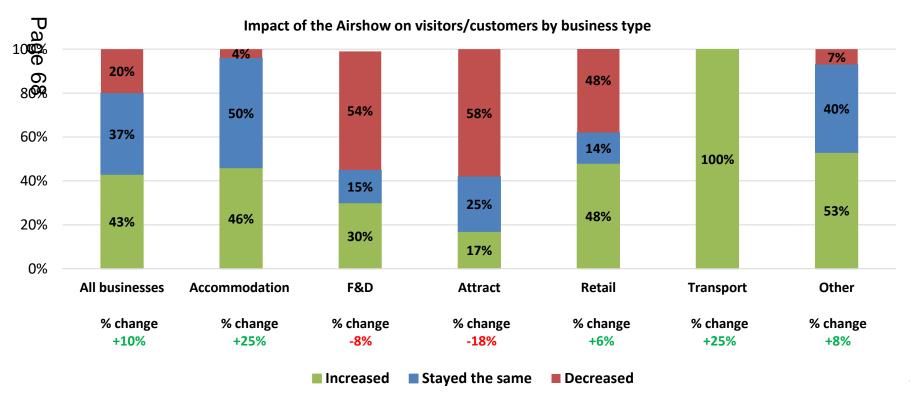


What was the impact of the Airshow on the number of visitors/customers by type of business?

46% of accommodation businesses reported increased visitors/customers during the Airshow whilst 50% said their visitor/customers numbers had stayed the same.

58% of visitor attractions, 54% of food & drink businesses and 48% of retail businesses reported decreased visitors/customers as a result of the Airshow taking place.

The estimated overall change in visitors/customers was +25% for accommodation businesses, -8% for food & drink businesses, -18% for visitor attractions, +6% for retail businesses, +25% for transport businesses and +8% for other businesses.

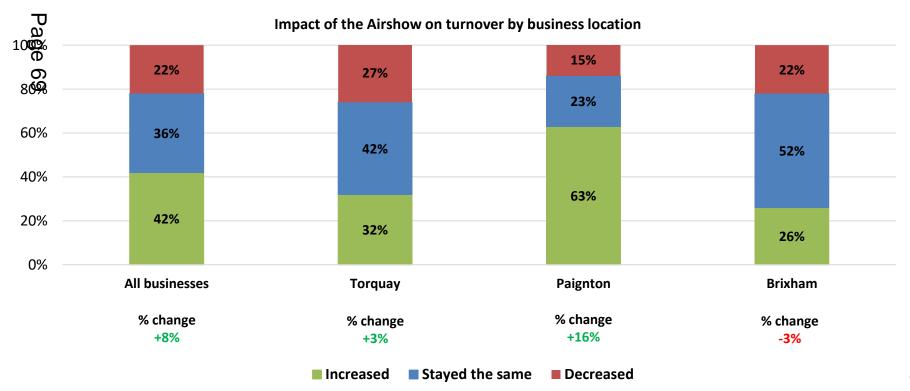


What was the impact of the Airshow on businesses turnover by location?

42% of businesses reported increased turnover during the Airshow with proportion increasing to 63% of Paignton businesses.

36% said their turnover had stayed the same (52% and 42% of Brixham and Torquay businesses respectively) and 22% reported decreased turnover as a result of the Airshow taking place including 27% of Torquay businesses, 22% of those based in Brixham and 15% of Paignton businesses.

The estimated overall change in turnover was +8% for all businesses increasing to +16% for Paignton businesses and decreasing to +3% for Torquay businesses. For Brixham businesses the overall change in turnover was calculated at -3%.

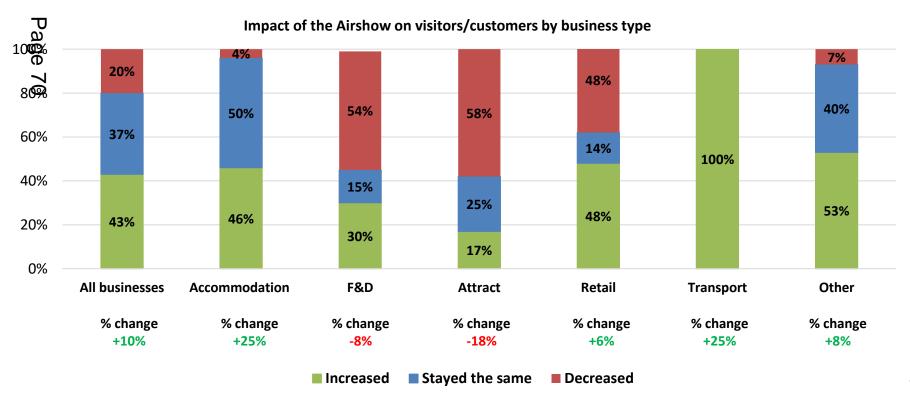


What was the impact of the Airshow on business turnover by type of business?

46% of accommodation businesses reported increased visitors/customers during the Airshow whilst 50% said their visitor/customers numbers had stayed the same and just 4% said they had decreased.

58% of visitor attractions, 54% of food & drink businesses and 48% of retail businesses reported decreased visitors/customers as a result of the Airshow taking place.

The estimated overall change in visitors/customers was +25% for accommodation businesses, -8% for food & drink businesses, -18% for visitor attractions, +6% for retail businesses, +25% for transport businesses and +8% for other businesses.



How did the Airshow impact on businesses opening hours, prices and staff levels?



Extended opening hours



Increased prices



Increased staff levels

How do businesses feel about the event?

Overall, there was a very high level of support amongst local businesses for the Airshow with 77% agreeing that it brings a sense of local/civic pride to the area. 50% of businesses disagreed that the event caused unnecessary littering, traffic congestion and pollution to the town and 43% agreed that the event was of great importance to their business.

"This Airshow brings about a sense of local/civic pride in the area"

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"The Airshow causes unnecessary littering, traffic congestion and pollution"

"The Airshow is of great importance to my business"





77% strongly agree/agree

14% neutral

8% disagree/ strongly disagree







23% strongly agree/agree

27% neutral

50% disagree/ strongly disagree



43% strongly

agree/agree



28% neutral



29% disagree/ strongly disagree

How do businesses feel about the event?

The large majority of businesses showed support for the event with 76% agreeing that it was of great importance to the local economy and 77% agreeing that it was of great importance to the overall image of the local area.

Overall, satisfaction levels were relatively good amongst businesses with 63% very satisfied or satisfied with the way the event was run.

"The Airshow is of great importance to the local economy"



76% strongly agree/agree

16% neutral

8% disagree/ strongly disagree

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"The Airshow is of great importance to the overall image of the local area"



77% strongly agree/agree



16% neutral



7% disagree/ strongly disagree

How satisfied were you with the way this years' Airshow was run?



63% very satisfied/ satisfied



27% neutral



10% dissatisfied/very dissatisfied

How do businesses feel about the event by location?

| | Torquay | | | Paignton | | | Brixham | | |
|---|----------------------------------|-----------|-------------------------------|----------------------------------|--------------|-------------------------------|----------------------------------|--------------|-------------------------------|
| | % strongly agree/ agree | % Neutral | % disagree/ strongly disagree | % strongly agree/ agree | % Neutral | % disagree /strongly disagree | % strongly agree/ agree | % Neutral | % disagree /strongly disagree |
| "This Airshow brings about a sense of local/civic pride in the area" | 75% | 15% | 9% | 83% | 9% | 8% | 66% | 28% | 7% |
| "The Airshow causes unnecessary littering, traffic congestion and pollution" \Omega \Omega | 24% | 27% | 49% | 23% | 21% | 56% | 21% | 48% | 31% |
| The Airshow is of great importance to my business" | 33% | 31% | 37% | 63% | 21% | 17% | 31% | 34% | 35% |
| "The Airshow is of great importance to the local economy" | 71% | 18% | 10% | 84% | 13% | 3% | 72% | 17% | 10% |
| "The Airshow is of great importance to the overall image of the local area" | 73% | 18% | 9% | 86% | 9% | 5% | 69% | 24% | 7% |
| How satisfied were you with the way this years' Airshow was run? | 55% | 31% | 14% | 77% | 18% | 5% | 55% | 45% | - |

What could be done to improve the Airshow for local businesses in the future?

A selection of responses is provided below (for the full list of responses please see the appendices which accompany the report).

Maybe turn it into a plane and boat regatta to incorporate all of Torbay.

Having lost the Trawler race it would be good to bring something "boaty back" maybe even incorporate steam trains too?

More planes flying around the whole bay, in the manner of the Red Arrows and the Typhoon of previous years. Timings for the Red Arrows sent to local businesses in advance to help us plan.

Trade outlets and stands all over the bay?

Something to help Brixham and Torquay viewers to know what is going on? More information needed about the day's program if you're not on Paignton Green. There were lots of long gaps when watching from Torquay and many people were disappointed. Maybe some volunteers giving out info? Food, drink outlets? Charge for trade stands across the bay?

Promotion of other areas

Ont just Paignton. This

will benefit the wider area

of Torbay as a

condessination.

Only that the flight route and aerobatics could be over Brixham as well as Paignton.

All local businesses should have first refusal on pitches for stalls / food outlets. Businesses from outside of the area should not be allowed to trade, especially if selling the same items as local businesses.

Offer a better park and ride facility.

More advertising throughout the Bay not just Paignton.

Make it a "One Day" event with more displays and less delays between displays.

Personally, I would prefer it if it wasn't during half term.
It would mean that we could advertise another
profitable holiday, in addition to half term.

Maybe let local businesses know how they can get involved. Maybe stalls on Paignton Green or something. Increase national marketing activity. Improve Airshow website - limited info and updates.

Better advertising- some of our guests knew nothing about it. They came from Bristol area. Make the programme of flying displays different each day. It will keep people interested in both days rather than one. Better national advertising to bring more people into the area. Offer a park and ride service

If the Airshow had any negative impact on your business, please explain how?

A selection of responses is provided below (for the full list of responses please see the appendices which accompany the report).

Brixham is very quiet when the Airshow is on as everyone is either in Paignton or staying away from coming to Brixham as the traffic is very bad.

The 2 days of the Airshow are financially the worst 2 days of the half term. It has been the same since it started, and we are unsure as to why given the number of people in the area.

Better central points around the bay - visitors didn't really know were to go.

Over in Brixham, it doesn't have much impact apart from possibly less people coming over as they stocat Paignton, either to watch or Because of the road closures.

Car park is full to bursting, then they walk into town and seafront. There is not a good view from here.

Concentrates customers in certain limited areas close the coastline. Businesses a few miles in tend to suffer from lower footfall.

6

Local customer kept away due to high volume

It empties Torquay town centre for two days.

Reduced footfall as locals and visitors travelled out of town to see the show from vantage points around Paignton. The weather also played a part as those who did not go to the show spent the day at the beach.

of traffic etc. Had to close on the Sunday (first time in 13 years) as not worth opening.

Left Torquay town centre dead whilst handing business to overpriced poor quality market traders leaving visitors feeling ripped off.

Local trade stayed away, parking issues and general disruption.

Less custom due to everyone going to Paignton to watch it. Traffic was awful. People parking up outside my business to watch Airshow from parking bays and on the pavement right outside my business.

Bringing in outside caterers killed our business.

Less footfall in my business as not near air show but definitely less customers.

Takes away potential customer's from Brixham to Paignton.

Taken people away from Torquay.

Any other comments about the event?

A selection of responses is provided below (for the full list of responses please see the appendices which accompany the report).

A great event but in future it would be good if the aircraft could spread themselves and their acrobatics across all parts of the bay to include Brixham & **Torquay**

We didn't get to see all the show due to daily tasks required in the running of our Guest House; however what we did see was श्रहें actacular. Watching the Red Arows from Battery Gardens, Brixham was electrifying. Would encourage everyone to see it at least once during their lifetime.

Shame there isn't a different program on day 2 rather tan just repeating what is on day 1 might get people staying for the whole weekend. Maybe have some events that include the whole of the English Riviera rather than just Paignton.

Keep it going Torbay needs the tourism.

I think it's an absolutely fantastic event, but I can quite understand the concern over the cost of it. I'm sure that a certain amount is provided through the Torbay BID and it's reasonable to expect the council to contribute a certain amount, but if there is a shortfall, perhaps crowdfunding would be an option.

If we lose this show it will certainly hit our business over those two days. Us and all the guest houses in our street were full and that also increases spend in pubs, shops and supermarkets etc.

Love it! Keep it going...especially the Red Arrows!

Generally, was better organised than last year.

It is an extremely important event for the area.

Fabulous event, really positive impact on mine and other businesses.

The weather was perfect. Nothing better than a boost for the local economy.

> extremely well tidied up and I was amazed on Monday morning at 6.30am that there was hardly any litter/signs of the mass of public that had attended. Well done to all of the teams that prepared in advance, worked on the days and tided up after everyone afterwards, a wonderful event that was thoroughly enjoyed, the free entry is very much appreciated to our guesthouse visitors and we hope for return visitors. Much needed publicity and promotion of Paignton that attracts 1000's of visitors. Thank

> > you ER.

It is always well organised,

Great event as always.

Great show, Red Arrows always pulls in the crowds. The children I look after enjoyed watching with parents.

English Riviera Airshow Evaluation 2023

Supplier/Trader Survey Results













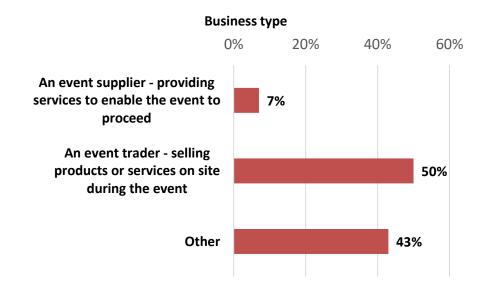




What was the type and location of suppliers/traders responding?

An online survey was distributed to suppliers of the Airshow who provided services which enabled the event to go ahead and traders who were licensed to sell goods onsite at the event. A total of 14 responses were received by the closing date of the 10th July 2023, however, there wasn't a large amount of traders working at the event with some businesses having multiple outlets. This also doesn't include local businesses already operating within the event site.

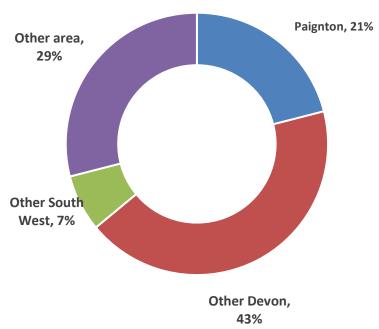
67% were independent businesses, 36% were part of a national chain and 7% part of a regional or county wide chain. 50% of respondents were businesses trading at the event and 7% were an event supplier providing services which enabled the event to proceed. 43% (6 businesses) categorised themselves as 'other' and included radio/media (2 respondents), a charity, the police, an event sponsor and Royal Air Force recruiter (1 respondent each).



43% of businesses were from other areas of Devon outside of the Torbay Council area and 29% were from other areas. 21% were based in Paignton and 7% from elsewhere in the South West (outside of Torbay or Devon).

Considering the sample size, type and location of respondents the results in this section should be viewed as indicative and do not allow for more detailed breakdowns below the overall sample.

Business location



Did staff stay in the local area?



21%

Suppliers/traders had staff stay in the local area



67%

Stayed in serviced accommodation



1,200

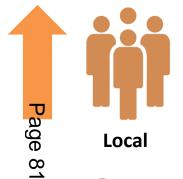
Additional value associated with overnight stays

How did suppliers/traders change?



14%

Increased staff levels



100%

Employed additional staff from the local area generating 110 additional staff days



£9,000

Value of local earnings from additional staff days



£9,000

Value of the local area subcontractors/suppliers work

How satisfied were suppliers/traders with their involvement with the festival?

Overall, satisfaction levels were relatively good amongst suppliers/traders with 72% very satisfied or satisfied with the level of business they received, 86% very satisfied or satisfied with their involvement with the festival and the same proportion very satisfied or satisfied with the way the festival was run.

86% of suppliers/traders said they would be interested in supplying/trading at the event in 2024.

How would you rate your overall satisfaction with the level of business you received at this years Air Festival?

How would you rate your overall satisfaction with your businesses involvement with this years Air Festival?

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As a festival supplier/trader how satisfied were you with the way this years Air Festival was run?



29% very satisfied /43% satisfied

0% neutral

14% dissatisfied/
14% very dissatisfied



50% very satisfied /36% satisfied



0% neutral



7% dissatisfied/
7% very dissatisfied



50% very satisfied /36% satisfied



7% neutral



7% dissatisfied/
0% very dissatisfied

How do suppliers/traders feel about the festival?

Overall, there was a very high level of support amongst the suppliers/traders taking part in the survey for the Airshow with 92% agreeing that it brings a sense of local/civic pride to the area. 71% disagreed that the event caused unnecessary littering, traffic congestion and pollution.

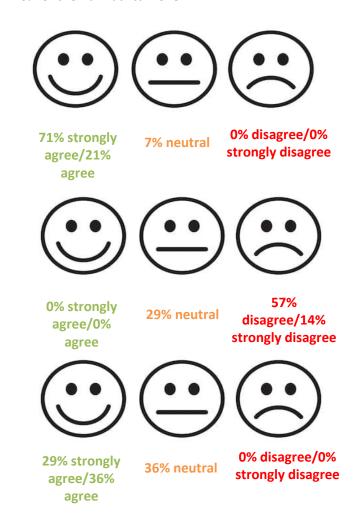
65% agreed that the event was of great importance to their business with 50% (7 businesses) saying that between 1-10% of their anticipated annual turnover is related to their involvement with the Airshow and 7% (1 business) 31-40% of their annual turnover.

"This Airshow brings about a sense of local/civic pride in the area"

Page 83

"The Airshow causes unnecessary littering, traffic congestion and pollution"

"The Airshow is of great importance to my business"



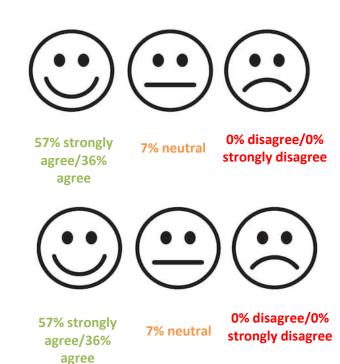
How do suppliers/traders feel about the festival?

93% of businesses in each case agreed that it was of great importance to the local economy and that it was of great importance to the overall image of the local area.

"The Airshow is of great importance to the local economy"

Page 84

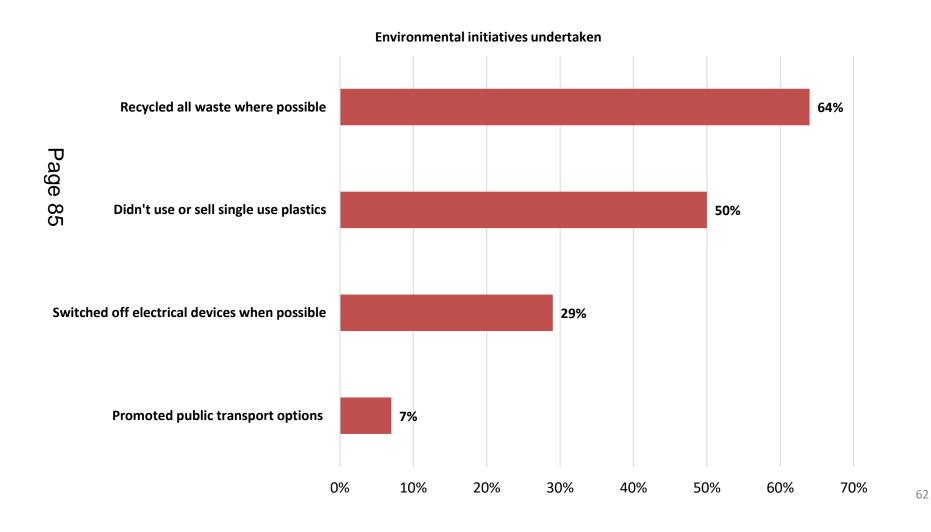
"The Airshow is of great importance to the overall image of the local area"



What environmental initiatives were undertaken?

71% of suppliers/traders responding to the survey undertook environmental initiatives for the Airshow.

The largest proportion, 64%, recycled waste where possible, 50% didn't use or sell single use plastics, 29% switched off electrics where possible and 7% promoted public transport.



What could be done to improve the Air Festival for those supplying the event or trading at the event in the future?

The responses received are provided below.

I found I had to chase for information. I didn't attend the event so only have staff feedback to answer the previous questions, hence neutral.

Opening hours could be extended and a music stage to be installed in the Traders area to keep people around after the flights.

⁻age 86

Not having more than 1 trader of specific goods. As a very small family business we had to compete against a large, non-local company who were positioned at the vey front entrance. Therefore, our sales were drastically impacted as the majority of people had brought from the big stall, not realising they could support local further down the strip. I believe we should not have been offered a pitch after the first one was secured; this would have saved our time and resources. Prioritising local businesses over non-local.

Ground display.

Always invite BBC Radio Devon ;-)

Nothing, we were more than happy with everything.

Not a lot really as it is an event that works.

Any other comments about the festival?

The responses received are provided below.

I liked the more concise timing of the flying with a pause for ground events. Maybe some new aircraft next year or the return of the typhoon?

Parking for traders could be allocated behind the stalls by bringing the stalls forward 5 meters or so. Especially as we use our vans for storage of stock. Other than that, we love being part of the event and believe its vital for the local economy to keep it going.

The show had a notable calm and enjoyable atmosphere throughout. Organisation was superb! Waste disposal and tidiness of site was excellent. Perhaps slightly less commentary at times. 'Less is more' and gives people a chance to think. The tanoy was pretty loud where we were located in the Military Village. All-in-all a brilliant couple of days. Congratulations All!

English Riviera Airshow Evaluation 2023

Calculating New Spend

















What adjustments were made to calculate the amount of new spend?

Whilst approximately £3.5m was spent by those attending the Airshow both at the event and in Torbay overall a large proportion of this did not occur as a direct result of the event itself and would have happened anyway or was expenditure which is likely to have leaked out of the local area after the event. Listed below are the adjustments made to the gross spend figure to reach the amount of new spend generated by the event.

Details of spend removed are as shown below;

- The event was not the main reason for the stay for 46% of those staying In Torbay.
- Staying visitors not influenced to stay by the event were asked if it was the main reason for their visit on the day of attending, 50% of those Ustaying in Torbay said it wasn't.

 Those influenced to visit by the event on the day of visit were asked if they would have been enjoying a leisure day out in Torbay if the event
- Those influenced to visit by the event on the day of visit were asked if they would have been enjoying a leisure day out in Torbay if the event wasn't on, those that would have been out anyway were removed from the data (40% of residents and 31% of day visitors). The removal of these attendees accounts for the money likely to have been displaced from other businesses in Torbay as evidenced in the local business survey data.
- Spend at the event was reduced by 25% to reflect the proportion of traders originating from outside of the Torbay area. The remaining 75% of event spend was estimated to have largely remained in the local area through locally based traders/businesses. All spend on programmes was removed as this is held by the council to invest in future events.

It's worth noting that no influenced staying visitors have been removed from the calculations. Historical occupancy data for Torbay going back to 2011 has been analysed and the average occupancy for June, for all accommodation types, across all years and pre and post Airshow, is around two thirds for the month. This would leave around 10,000 bedspaces unoccupied in Torbay on any given day and so even if the occupancy for the weekend of the Airshow is higher than the monthly average it's highly likely that the estimated numbers of influenced visitors could easily be accommodated and as such they aren't preventing others from coming to the area.

English Riviera Airshow Evaluation 2023

Cambridge Model

















Cambridge Model

Overview of the model and multipliers

The Cambridge Model is a computer-based model developed to calculate estimates of the volume, value and economic impact of tourism on a County or District basis. It draws on the combined experience of PA Cambridge Economic Consultants Ltd, Geoff Broom Associates and the Regional Tourist Boards and utilises a standard methodology capable of application throughout the UK. It therefore offers the potential for direct comparisons with similar destinations throughout the country. The approach was the subject of independent validation (R.Vaughan, Bournemouth University) in December 1994. The Model was judged robust and the margins of error acceptable and in line with other modelling techniques.

The multipliers used for this economic evaluation are the same as those used to calculate Torbay data in the Value of Tourism report produced annually by The South West Research Company.

economic impact is based on the estimates of spending by staying and day visitors. The Model uses these estimates of expenditure by the different visitor groups as the basis for estimating the level of employment supported by that spending. This includes an internal business database uses data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others.

The Model in its basic form relies on using information from a range of sources. The methodology and accuracy of these sources varies, and therefore the estimates can only be regarded as indicative of the scale and importance of visitor activity in the local area. As with all models, the outputs need to be viewed in the context of local information and knowledge. Because of the data sources and modelling process, there is potential for larger margins of error associated with some individual figures, with small numbers being particularly prone to such errors. Therefore the outputs should be taken as indicative rather than definitive.

English Riviera Airshow 2023 Evaluation

The South West Research Company Ltd

www.tswrc.co.uk















English Riviera Airshow 2023
July 2023





The Plaster team works in partnership with REM, Torbay Council and The English Riviera BID Company to deliver the media relations, social media, marketing, crisis management and onsite communications plans for the event.

Plaster distributed four press releases including the launch release announcing the return of the airshow, RAF Red Arrows announcement along with car parking messaging, full aircraft line-up and a planning ahead release for visitors. The team also coordinated interviews with media for pilots and spokespeople - totaling 45 pieces of broadcast coverage featuring soundbites set up by Plaster.

Plaster created and updated design assets for the airshow, including social banners, logos, social tiles and assets for the English Riviera Airshow programme, which was sold on-site across the event weekend. Plaster updated the website for the event on an ongoing basis, with sponsorship opportunities, trader information, flight schedules and visitor information.

Plaster managed the social media channels for the English Riviera Airshow, including community management, responding to enquiries and providing key information to visitors from February 2023 until June 2023, including live social activity across the airshow weekend. Plaster managed the output of key messages and flight updates across the weekend, as well as highlighting key sponsors.





237

618,507,026

1,383,885



12,820,000

619,789,026

1,383,885





OBJECTIVES

- COMMUNICATION Position the airshow as one of the leading summer family events in the UK
 - Attract visitors locally, regionally and nationally to experience the English Riviera
 - Manage communication of commercial elements of the event including advanced car parking, the park and ride and hospitality opportunities

MESSAGES

- KEY The English Riviera Airshow is a free, memorable coastal event suitable for all the family
 - It is a signature annual event for the area, placing it on the national map as a destination of choice to support the tourism economy
 - The event offers an incredible air display programme, celebrating both military and civilian aircraft with complementary activities and entertainment on the ground





























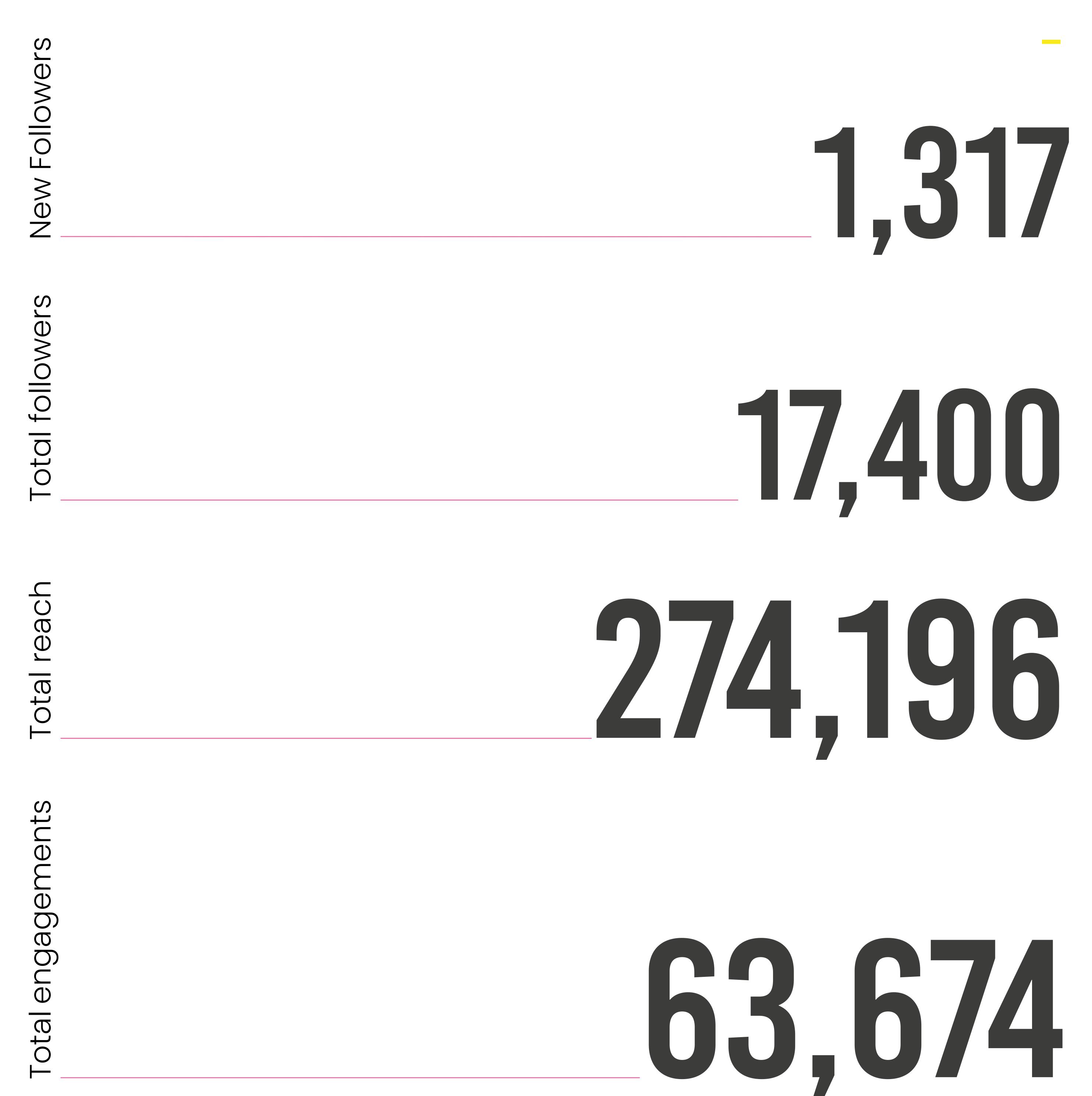




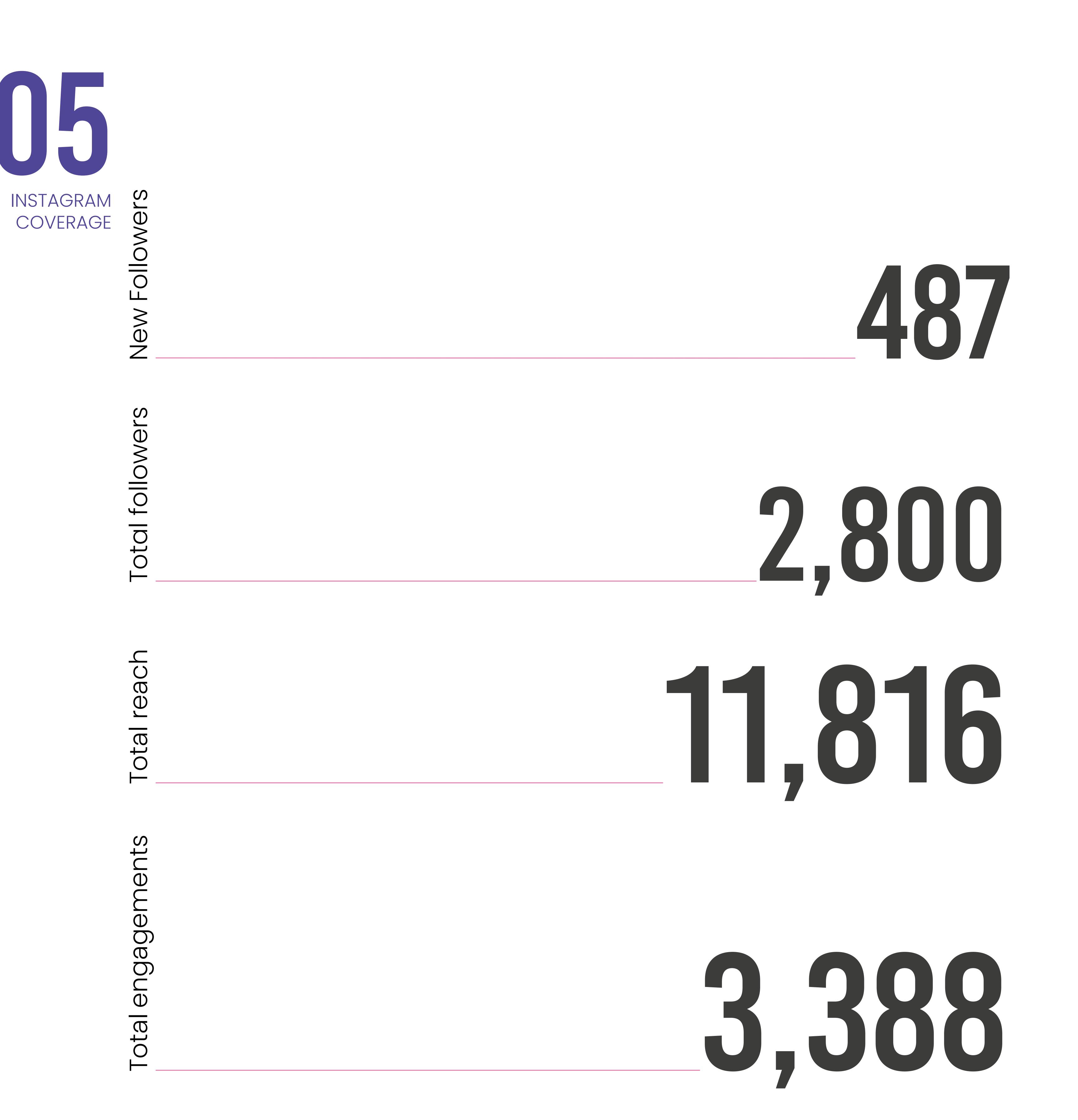
Herald Express

JUUIAL GUVERAUE





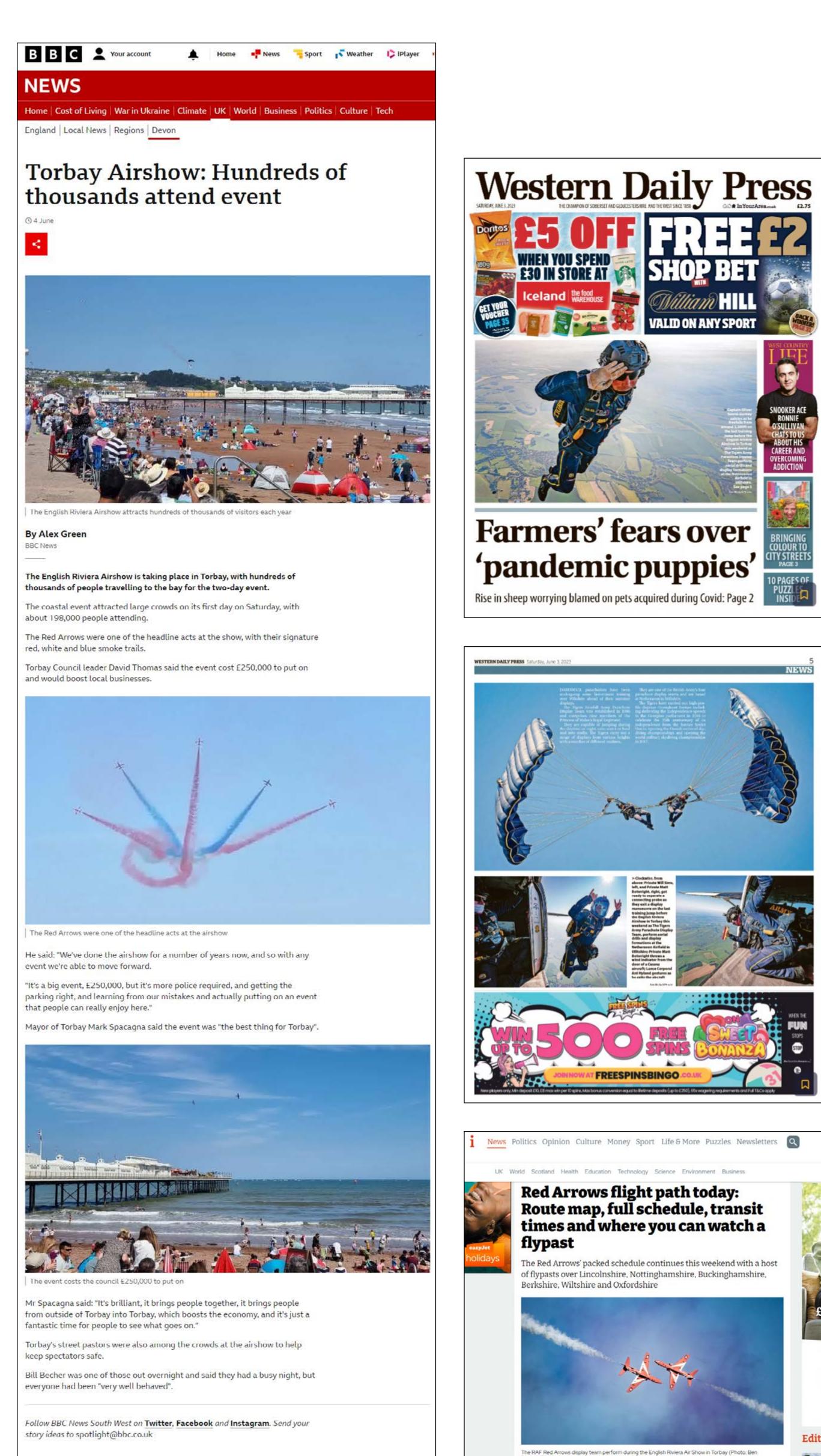


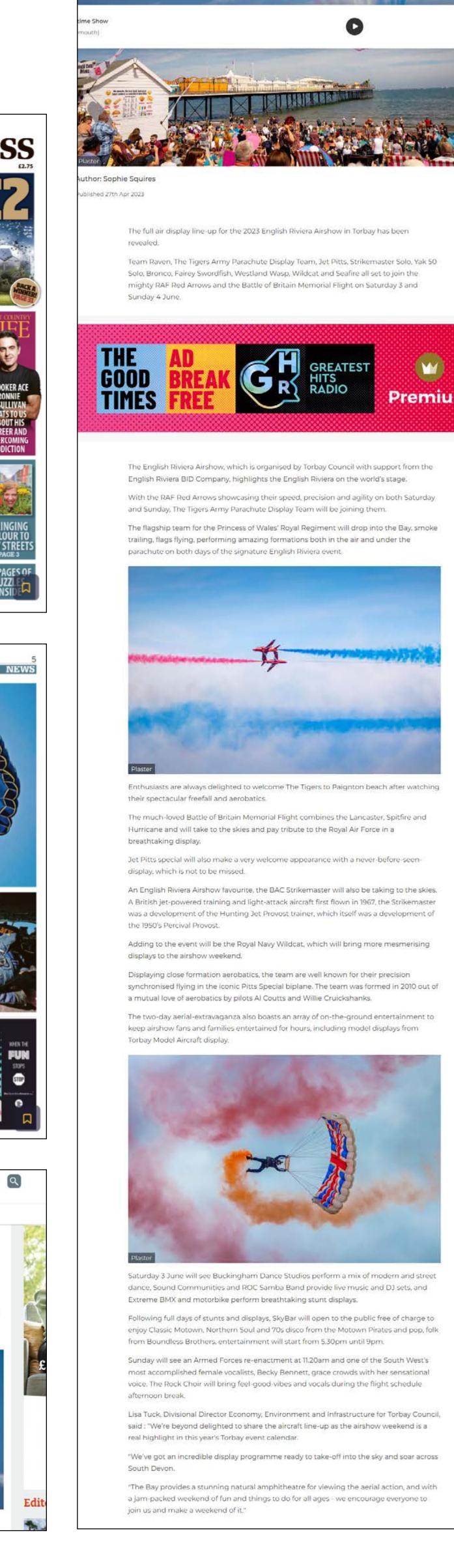






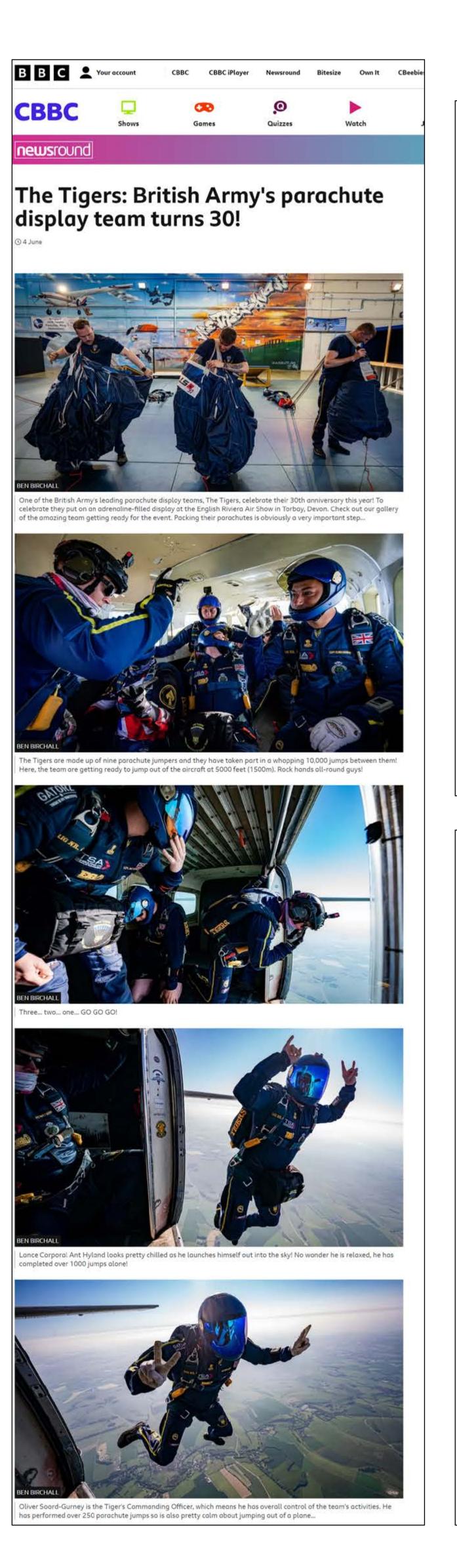




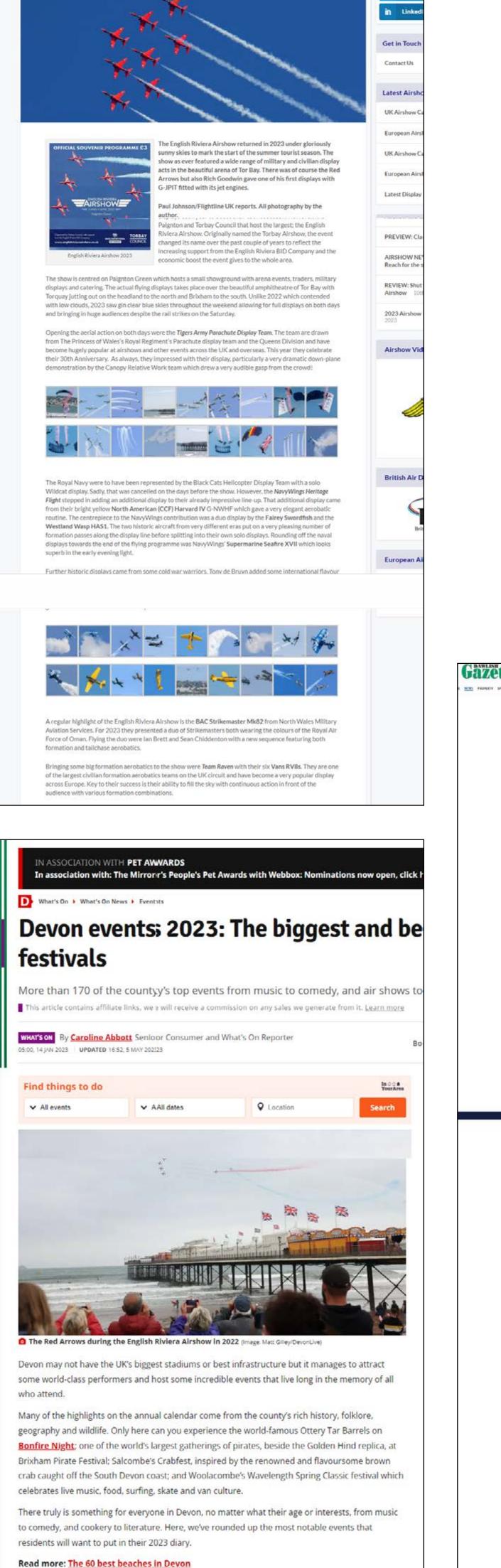


PLANET RADIO > GREATEST HITS > PLYMOUTH > NEWS

Full line-up for English Riviera Airshow revealed







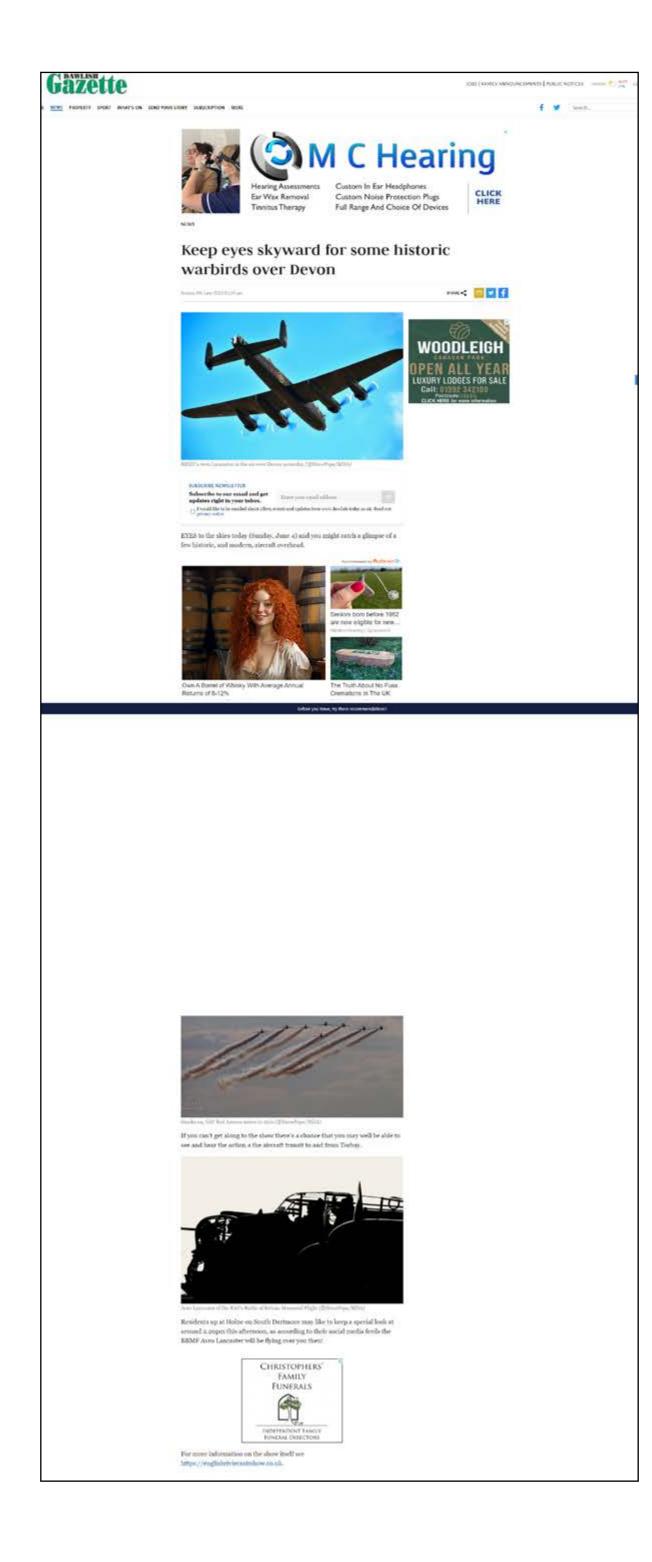
It's a list that visitors will want to check out in order to discover what's going on. And it's a list that

will be regularly updated as the year progresses, as more events are announced and more details

t us know about an upcoming event, email

okmark this page and check back every so often. Events are

REVIEW: English Riviera Airshow 2023





UUULJ

"One of the British Army's leading parachute display teams, The Tigers, celebrate their 30th they put on an adrenaline-filled display at the English Riviera Air Show in Torbay, Devon. Check out our gallery of the amazing team getting ready for the event. Packing their parachutes is obviously a very important step...'

"The RAF Red Arrows will perform on both days of the English Riviera Airshow, organisers have announced. They will anniversary this year! To celebrate lead the breath-taking aerial displays on Saturday, June 3, and Sunday, June 4. Their distinctive red, white and blue smoke will trail colour through the skies over the Bay at the event, which will be a fantastic weekend for aviation enthusiasts of all ages."

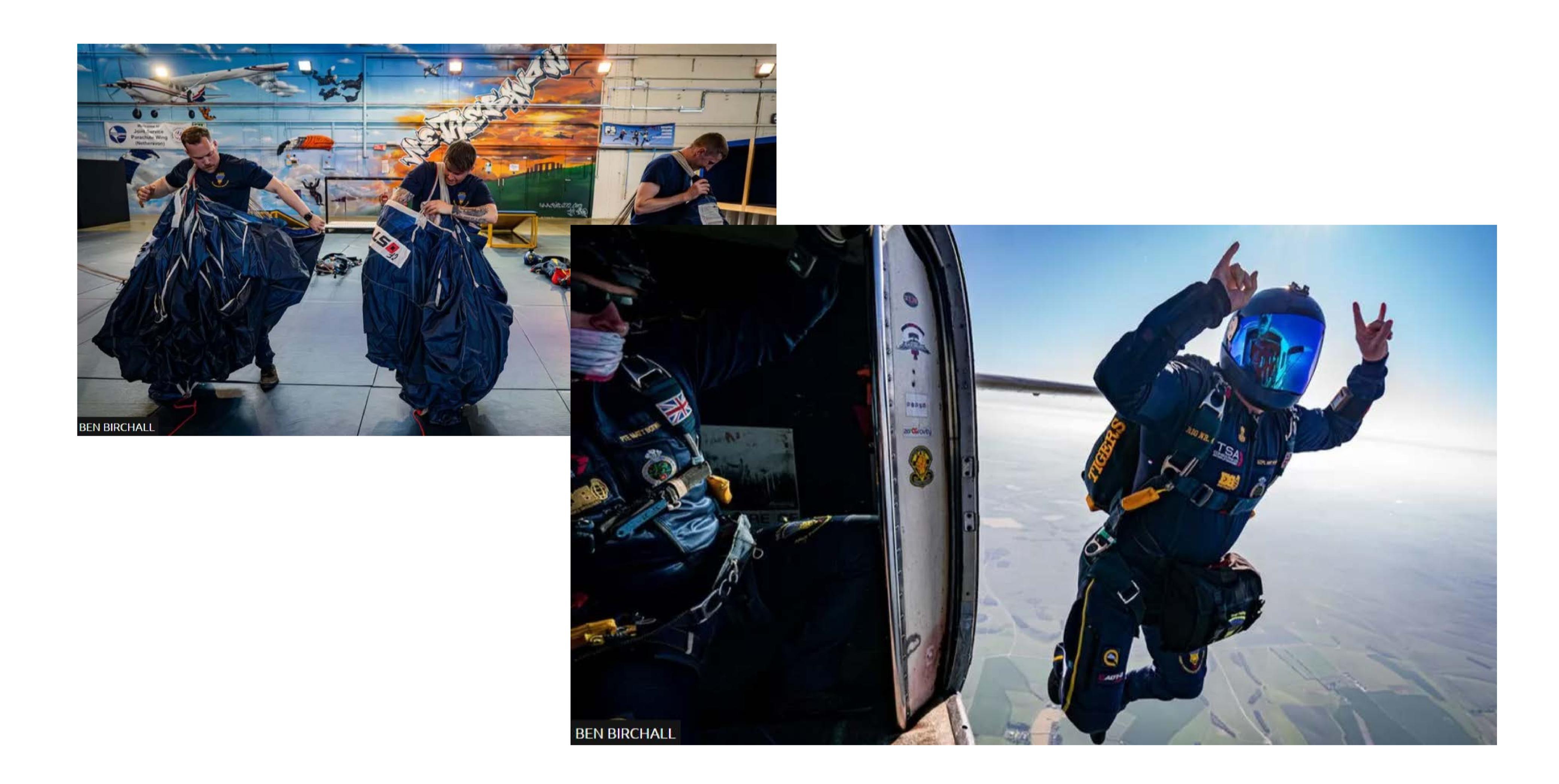
"English Riviera Airshow is set to return this year for another full weekend of action packed displays and great activities. The two day show takes place on Paignton Green with the Bay providing a stunning natural amphitheatre for viewing the air displays and the perfect location for a large coastal airshow event."



KEY MEDIA AND Plaster secured an opportunity for the Press PARTNERSHIPS Assocation to take part in a tandem dive with the Tigers Army Parachute Display Team which secured national coverage across online and print publications. Plaster secured a media partnership with BBC Radio Devon who provided the soundtrack across the event weekend, including key messaging for the public. Plaster outreached to key media outlets and liaised with display teams to secure interviews with the RAF Red Arrows and the YAK.

> Plaster also provided ITV and BBC news outlets with video and GoPro footage of display teams to broadcast outlets across the weekend.

Plaster secured national coverage in the I. Paper, I.News, Mail Online and BBC Newsround as well as regional coverage across the BBC, ITV News and Devon Media, positioning the English Riviera Airshow as a free family day out across the weekend.



ON-SITE ACTIVITY Over the weekend, we hosted accredited and hosted key media: Press facilitated their own vox pops with members of the public. Association, ITV West Country, BBC Spotlight, BBC Radio Devon, Devon Live, Herald Express and Torbay Weekly, setting up interviews with The Tigers, Red Arrows Ground Teams and Clir David Thomas.

BBC Radio Devon were on site across the weekend broadcasting live from the Military Village. We set up interviews with display teams and Cllrs and they

ASSETS Plaster updated and produced artworks across the English Riviera Airshow activity, including:

- Billboards
- Banners
- Event Programme Assets
- Logos
- Posters
- Road Closure Maps
- Site Maps
- Social Tiles and Icons
- Website Collateral



COVERAGE LOG

Print & Online tab & Broadcast Tab



| DATE | HEADLINE | MEDIA TYPE | PUBLICATION | VALUE | REACH | LINK |
|------------|---|-------------------------|------------------------------------|--------|-----------|--|
| 08/11/2022 | Preview: English Riviera Airshow 2023, Torbay | Online | Flightline | | 43,500 | https://www.air-shows.org.uk/2022/11/preview-english-riviera-airshow-2023/ |
| 20/01/2023 | Devon events 2023: The biggest and best shows, gigs and festivals | Online | Devon Live | 101786 | 5,975,948 | https://www.devonlive.com/whats-on/whats-on-news/devon-events-2023-biggest-best-8015615 |
| 02/02/2023 | Fly & Meet the LAA. Rufforth East, N Yorks, rufforthairfieideast.co.uk 5-13 BGA Bannerdown & Inter-Services Regionals, | Print | Pilot | | 12041 | |
| 01/03/2023 | RAF Red Arrows confirmed for English Riviera Airshow | Online | Devon Live | 101786 | 5,975,948 | https://www.devonlive.com/whats-on/family-kids/raf-red-arrows-confirmed-english-8198747 |
| 01/03/2023 | Airshows: RAF Red Arrows lead areial displays at ERAS | Online | Flightline | | 43,500 | https://www.air-shows.org.uk/2023/02/airshow-news-raf-red-arrows-lead-aerial-displays-at-english-riviera-airshow/ |
| 01/03/2023 | Airshow prepares for takeoff | Online | Dartmouth Today | | 17,800 | https://www.dartmouth-today.co.uk/news/airshow-prepares-for-takeoff-597942 |
| 01/03/2023 | English Riviera Airshow gears up for June | Online | Kingsbridge & Salcombe Gazzette | | 20,400 | https://www.kingsbridge-today.co.uk/news/airshow-prepares-for-takeoff-597942 |
| 01/03/2023 | Airshow prepares for takeoff | Online | Totnes Times | 294 | 30,900 | https://www.totnes-today.co.uk/news/airshow-prepares-for-takeoff-597942 |
| 01/03/2023 | English Riviera Airshow is set to return this year for another full weekend of action packed displays | Online | Visit South Devon | | 102,500 | https://www.visitsouthdevon.co.uk/whats-on/english-riviera-airshow-p1951223 |
| | English Riviera Airshow | Online | Premier Marinas | | 18,100 | https://www.premiermarinas.com/en/Marina-News-Events/Marina-Events/2023/June/Torbay-Air-Show?marina=%7B98E1B352-7266-4648-906A-8F0DF8441B45%7D |
| 01/03/2023 | Airshow prepares for takeoff | Online | Ivybridge & South Brent Gazzette | | 15,700 | https://www.ivybridge-today.co.uk/news/airshow-prepares-for-takeoff-597942 |
| 01/03/2023 | English Riviera Airshow | Online | Staytripper | | 15,200 | https://www.staytripper.co.uk/whats-on/english-riviera-airshow-p1121181 |
| 01/03/2023 | English Riviera Airshow dates announced | Online | Visit Devon | | 84,500 | https://www.visitdevon.co.uk/visitor-information/more-information/news/2023/2/15/english-riviera-airshow-dates-announced-a7694 |
| 01/03/2023 | English Riviera Airshow | Online | Southhams | | 31,400 | https://www.southhams.com/events/south-hams-june-events/torbay-air-show |
| 01/03/2023 | What's on in Devon this June | Online | Devon With Kids | | 28,900 | https://devonwithkids.co.uk/whats-on-in-devon-june-family-guide/ |
| 02/03/2023 | It's official - the Red Arrows are zooming in! | UK Additional Regionals | Torbay Weekly | 185.76 | 0 | |
| 02/03/2023 | Sidmouth Air Show 2023: Red Arrows to make huge return this summer | Internet | DevonLive.com (Web) | 2732 | 101786 | https://www.devonlive.com/whats-on/whats-on-news/sidmouth-air-show-2023-red-8204085 |
| 02/03/2023 | Torbay Weekly will help airshow take off as new media partners | UK Additional Regionals | Torbay Weekly | 111.84 | 0 | |
| 02/03/2023 | Devon airshow rolls out for take-off | UK Additional Regionals | TotnesTimes | 294 | 4400 | |
| 02/03/2023 | It's official - the Red Arrows are zooming in! | Print | Torbay Weekly | | 20,000 | |
| 02/03/2023 | Devon Airshow rolls out for take-off | Print | Totnes Times | 294 | 4,500 | |
| 02/03/2023 | English Riviera Airshow 2023 | Online | Flightline | | 43,500 | https://www.air-shows.org.uk/events/english-riviera-airshow-2023/ |
| 03/03/2023 | Devon airshow rolls out for take-off | UK Additional Regionals | Kingsbridge and Salcombe Gazette | 159.2 | 7072 | |
| 03/03/2023 | English Riviera Airshow to take flight this June | Print | Mid Devon Advertiser (Teignbridge) | 139.86 | 0 | |
| 06/03/2023 | Red Arrows soaring back to South Devon | Internet | Dawlish Post (Web) | 8 | 285 | https://www.dawlish-today.co.uk/news/entertainment/red-arrows-soaring-back-to-south-devon-599106 |
| 06/03/2023 | Red Arrows soaring back to South Devon | Internet | Newton Today (Web) | 212 | 3558 | https://www.middevonadvertiser.co.uk/news/entertainment/red-arrows-soaring-back-to-south-devon-599106 |
| 08/03/2023 | Red Arrows confirmed for Riviera air show | UK Additional Regionals | Herald Express (Torquay) | 595.11 | 16411 | |

| DATE | HEADLINE | MEDIA TYPE | PUBLICATION | VALUE | REACH | LINK |
|------------|---|-------------------------|--|---------|--------|--|
| 16/03/2023 | Park and fly: Iconic Battle of Britain Memorial Flight confirmed to return to the English Riviera Airshow as car parking tickets go on sale | Internet | Torbay Council (Web) | 169 | 6310 | https://www.torbay.gov.uk/news/pr8873/ |
| 17/03/2023 | What's on? | Magazine, Consumer | Aviation News | 3768.96 | 18000 | |
| 17/03/2023 | English Riviera Airshow 2023: Spitfire, Hurricane and Lancaster Bomber to fly over Devon | Internet | DevonLive.com (Web) | 2732 | 101786 | https://www.devonlive.com/news/local-news/english-riviera-airshow-2023-spitfire-8256539 |
| 18/03/2023 | Iconic Battle of Britain Memorial Flight confirmed to return to the English Riviera Airshow | Print | We Are South Devon (Web) | 5 | 0 | https://wearesouthdevon.com/iconic-battle-of-britain-memorial-flight-confirmed-to-return-to-the-english-riviera-airshow/ |
| 21/03/2023 | Red Arrows in Devon 2023 - where and when to see them | Internet | DevonLive.com (Web) | 2732 | 101786 | https://www.devonlive.com/whats-on/whats-on-news/red-arrows-devon-2023-see-8270504 |
| 22/03/2023 | Memorial flight joins air show line-up | UK Additional Regionals | Herald Express (Torquay) | 602.58 | 16411 | |
| 23/03/2023 | Iconic wartime aircraft are taking to skies for English Riviera Airshow | UK Additional Regionals | Torbay Weekly | 195.36 | 0 | |
| 25/03/2023 | Red Arrows 2023: confirmed list of where and when the RAF aerobatic display team will perform this year | Internet | Bedford Today (Web) | 12 | 1122 | https://www.bedfordtoday.co.uk/read-this/red-arrows-2023-red-arrows-2023-display-schedule-4078384 |
| 25/03/2023 | Red Arrows 2023: confirmed list of where and when the RAF aerobatic display team will perform this year | Internet | Lancaster Guardian (Web) | 364 | 13576 | https://www.lancasterguardian.co.uk/read-this/red-arrows-2023-red-arrows-2023-display-schedule-4078384 |
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| 09/06/2023 | Airshow is top gun with the crowds | UK Additional Regionals | Teignmouth News (Dawlish Gazette) | 1294.2 | 11557 | |
| 09/06/2023 | Airshow is top gun with the crowds | Print | Mid Devon Advertiser (Teignbridge) | 1212.12 | 0 | |
| 13/06/2023 | Red Arrows flight path today: Route map, full schedule, transit times and where you can watch a flypast | Internet | iNews (Web) | 43206 | 1609658 | https://inews.co.uk/news/red-arrows-flight-path-today-route-map-full-schedule-transit-times-where-can-watch-flypast-2401070 |
| 14/06/2023 | Red Arrows flight path today: Route map, full schedule and transit times for Sunday"s Cosford Airshow display | Internet | iNews (Web) | 43206 | 1609658 | https://inews.co.uk/news/red-arrows-flight-path-today-route-map-full-schedule-transit-times-sunday-cosford-airshow-display-2401402 |
| 15/06/2023 | All smiles for English Riviera Airshow | UK Additional Regionals | Torbay Weekly | 122.88 | 0 | |
| 20/06/2023 | Pictures: All smiles at English Riviera Airshow | Internet | Torbay Weekly (Web) | 5 | 0 | https://www.torbayweekly.co.uk/pictures-all-smiles-at-english-riviera-airshow/ |
| 22/06/2023 | Red Arrows will roar over Devon on Friday - where and when to see them | Internet | DevonLive.com (Web) | 2732 | 101786 | https://www.devonlive.com/news/devon-news/red-arrows-roar-over-devon-8539291 |
| 26/06/2023 | Calls for English Riviera Airshow to become elite UK attraction | Internet | DevonLive.com (Web) | 2732 | 101786 | https://www.devonlive.com/news/news-opinion/calls-english-riviera-airshow-become-8534825 |
| 30/06/2023 | Different Ways to Take to the Air in Devon | Internet | Devon 24/7 (Web) | 143 | 5338 | https://www.thedevondaily.co.uk/news/local-news/different-ways-take-air-devon |
| 04/06/2023 | The Tigers: British Army's parachute display team turns 30! | Internet | BBC Newsround | 261016 | 573300000 | https://www.bbc.co.uk/newsround/65788093 |



Appendix 3: Riviera Airshow 2024: Learning points and suggestions for future Air Shows

Focussed approach to sponsorship and fundraising to reduce council's financial input into the event.

Reduce the number of flying days to 1 (currently the air display is the same on both days – is this beneficial (cost versus financial impact to area)

Look at combining Armed Forces Day with airshow: increased military presence with potential for enhanced ground display which could include military vehicles and static aircraft, marching bands, whilst also reducing costs on infrastructure for both events

Build on arena performances and seek to include more 'wow factor' or 'adrenalin - fuelled performances and demonstrations – Royal Marine band, marines / armed forces/police dog demonstrations etc.

Look at the hospitality offer. Make it more inclusive by other external viewing area (marquee, premium seating area and exclusive bar – this could be done by working with Bays Brewery or other provider) to encourage general public sales)

Greater PR/comms awareness over 12-month period rather than just a few months before.

Use PR to attract public and corporate support in respect of donations to fund air display.

Explore options of programme – digital app as an alternative?

Consider working with local artist to come up with a higher value programme (exclusive centre page print from artist or specially designed front cover).

Look at introducing a STEM village with educational participation.

Link in with local forces and historic groups.

Manage ground display and trade village entirely with 1 FT officer working as festival organiser.

Consider Preston as part of the Airshow footprint.

Consider trade pitches at other viewpoints around the bay.

Work with travel partners to bring more people into the area.

Look at the potential for airshow/accommodation weekend packages for accommodation sector.



English Riviera Air Show Survey with Community Partnerships Summary Results

| | | | | | | Saturday | Sunday |
|--|-----|----|----|--|-----------|-------------|--------|
| | Yes | | No | | Both | only | only |
| Q1 Did you go watch the English Riviera Air Show in July 2023? | | 42 | 12 | If Yes did you watch it on both days? | 29 | 9 | 4 |
| | | | | | | | |
| | Yes | | No | | | | |
| Q2 Did any members of your household go watch it? | | 37 | 13 | | | | |
| | | | | | | | |
| | Yes | | No | Please provide a reason for your answer* | rocponeo | e chown toh | 2 |
| Q3 Do you think you will go next year? | | 42 | 9 | Please provide a reason for your answer | responses | s shown tab | |
| | | | | | | | |
| | | | | | | | |
| Q4 What specific changes would you like to see for future air shows? | | | | Please provide a reason for your answer* | responses | s shown tab | 2 |

| | | Number |
|-----------------------|-----|--------|
| What is your postcode | TQ1 | 4 |
| | TQ2 | 3 |
| | TQ3 | 12 |
| | TQ4 | 16 |
| T | TQ5 | 1 |
| Towal | | |

ge 1

Summary of Responses Q3

Due to the best event in torbay.

It's great x 4

Yes - The Red Arrows and the Typhoon are too good to miss. Other displays are usually quite good. The whole weekend has the town buzzing, something which does not happen often enough. What other event can bring 185,000 people into Paignton over a weekend AT A TIME BEFORE THE HOLIDAY SEASON HAS STARTED?

No (I went to the first one and saw part of the 2022 one as I live near the seafront. But if you've seen one air show you've seen them all, to be honest and I'm not sure about the financial viability of having one every year) IT IS ALWAYS A GREAT SHOW AND CONVERSATION PIECE AMONGST FRIENDS AND VISITORS FOR SEVERAL WEEKS BEFORE AND AFTERWARDS. ALSO GOOD FOR BRAGGING RIGHTS WHEN VISITING **AWAY**

The Air Show is a fantastic Spectacle which is only now coming out of its infancy. If carried on in my view it will go from strength to strength bringing in much needed income to Torbay and Paignton in particular. The open bay at Paignton is perfect for the show which can take place safely over water and still be seen intimately. Long may it Page Unfortur

Unfortunately we had to be up North looking after grandchildren at half term this year. I enjoyed it last year.

keep it going.

On Since it's been on I have only been twice as it always seems the same as it did the previous time.

As an avid amateur photographer I love the Air show and the opportunities to photograph planes in our local 'Bay of Dreams ' arena. The highlight of the year for myself, family and friends.

The show is refreshing and it's such as change to be in such a pleasant atmosphere.

It is totally inappropriate that the Council, using taxpayers money, should glorify an industry which is so damaging to our environment.

With awareness of our environment planes to simply look at doesn't seem worth their impact with the fuel burned and as a whole for our town.

A truly socio-economically vibrant event that puts Torbay clearly on the map.

We look forward to it every year.

Because we really enjoyed it. In fact my sister, who lives in Cambridge, and her family are planning to come down to Torquay to see it next year.

It's a crowd pleaser, dramatic and exciting, builds local pride and community cohesion

Summary of Responses Q4

NONE KEEP THE SAME More planes, bigger better x 9

T

I can appreciate why there are gaps between the displays and that traders need to make a return on their outlay. I think that this year the gaps were too frequent and too long. Happens the ground based entertainment could have been before the airborne displays started.

more variety and less time between. Great event for Paignton families .

Sunday was a much better programme than Saturdays.

I would like to see a more busy, taut programme with less time between events.

INCLUDE A REALLY FAST JET LIKE THE TYPHOON , THE EXHAUST NOISE AND IT'S VERTICAL CLIMB ARE PARTICULARILY MEMORABLE

think a carpark should be set up. Disabled parking considered and access area created.

I think it is a superb event for Torbay, it would be a real shame to lose it!

if it cost so much money why do we not have something on a small size. or make a charge for people to watch

Look at one day only - pack more into it as opposed to long delays x 7

Research how Teignmouth manage to do similar show with no council funding One day only is enough. Engage with all the hotels, bars and Pier to make sizeable contributions.

Keep this part! Broadcasting the announcements on the radio was very helpful - enabling people to hear them better wherever they were watching

More inclusion for local residents. Change the format, same old, same old every year.

I think it's pretty good but more planes would be good, including seaplanes in the Bay

if it doesn't bring profit to Torbay to the benefit of local taxpayers - scrap it Liase with the bus companies. There should have been extra buses laid on. The queues and time wait was crazy. Find a better place for the replacement taxi rank - maybe ask some of the taxi drivers for their suggestions

Summary of Responses Q4 continued

More parking spaces in Paignton.

More businesses with stands/stalls on the seafront. I would also be happy to pay a nominal fee to watch the Air Show, although I appreciate this would be difficult to administer. Have some different planes.

I personally would love to see the RAF Typhoon return to the programme, along with any other fast jets that are available. Maybe this could be done by not having the Red Arrows on both days?

Better audio coverage as it was sometimes difficult to hear what was being said over the tannoy.

Stop the event altogether, it is totally at odds with the Council's Climate Emergency Policy. I think vantage points with audio outside of Paignton, i.e. Torquay and Brixham, would extend the outreach and provide just as much enjoyment.

The 2 days are quite repetitive. Do something different on the other day eg boat-related.

A lot more could be done to encourage voluntary donations. We did see one stand where it was possible to buy a programme but no 'chuggers', nowhere to chuck some cash in a bucket.

Could we have something on Abbey Meadows? You could broadcast the commentary there and to Brixham or QuayWest? Have children's entertainment such as go-carts in Torquay or one of the other spots. ensure Stagecoach provides shuttle buses.