

English Riviera Airshow Evaluation 2023

Final report

Commissioned by Torbay Council

Produced by

The South West Research Company Ltd

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English Riviera Airshow Evaluation 2023

Key Findings, Conclusions & Recommendations



Key Findings

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

- 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.
- 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.

Key Findings

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.
- 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%).

Key Findings

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/customer 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.

Key Findings

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.
- 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 levels 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 staying 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:

- 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. Post-event online attendee surveys

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 16th 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. Daily visitor counts

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

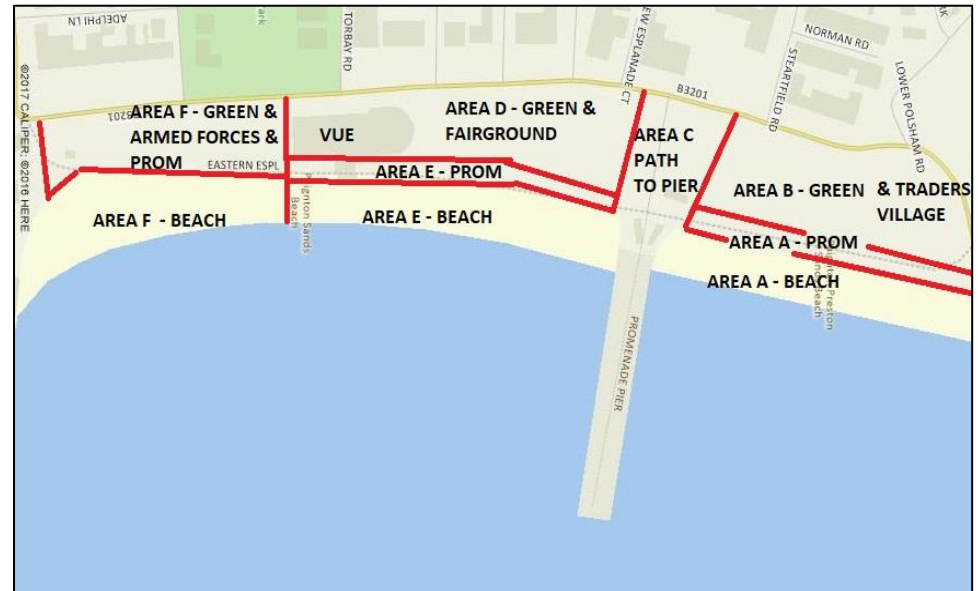
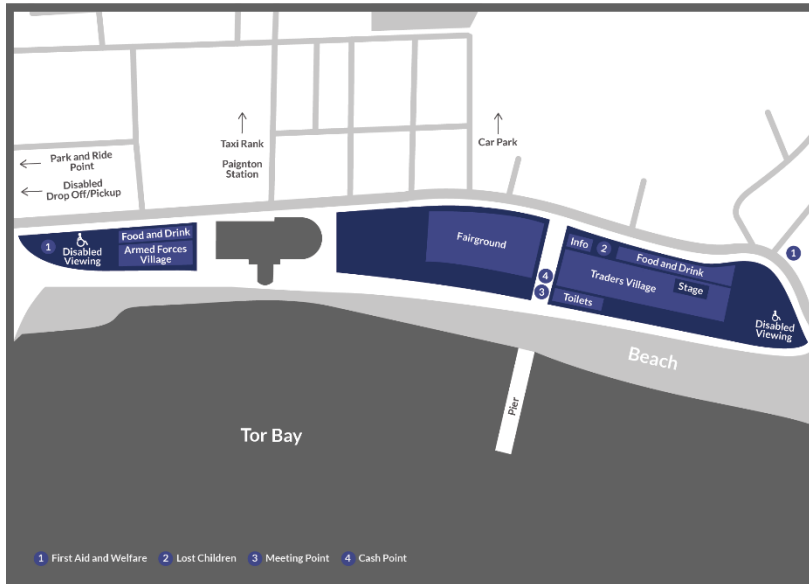
Attendance and Economic Impact



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.

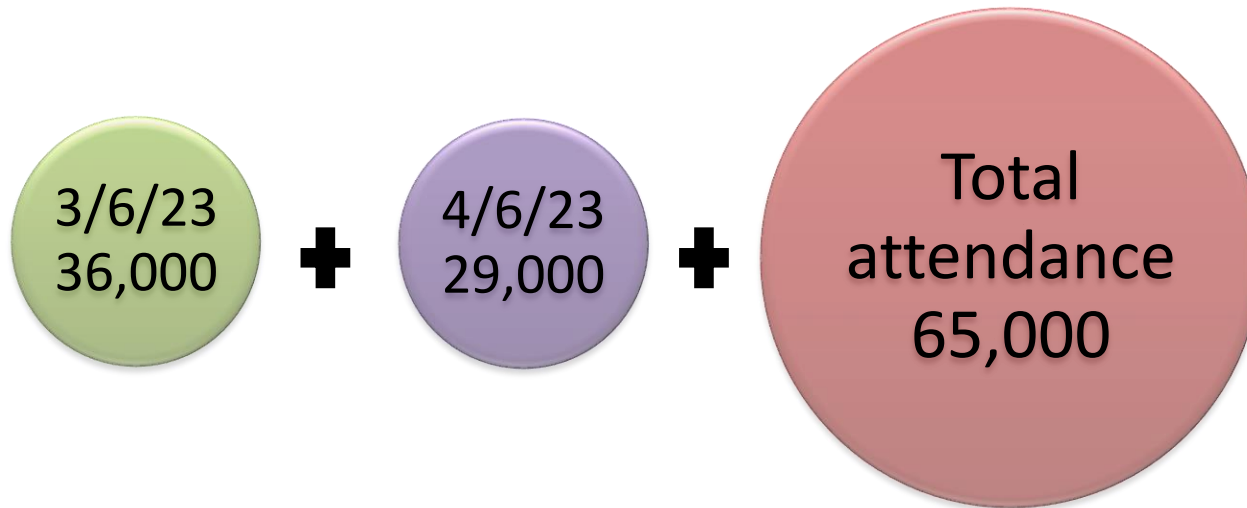


How many people attended the event?

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.

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).

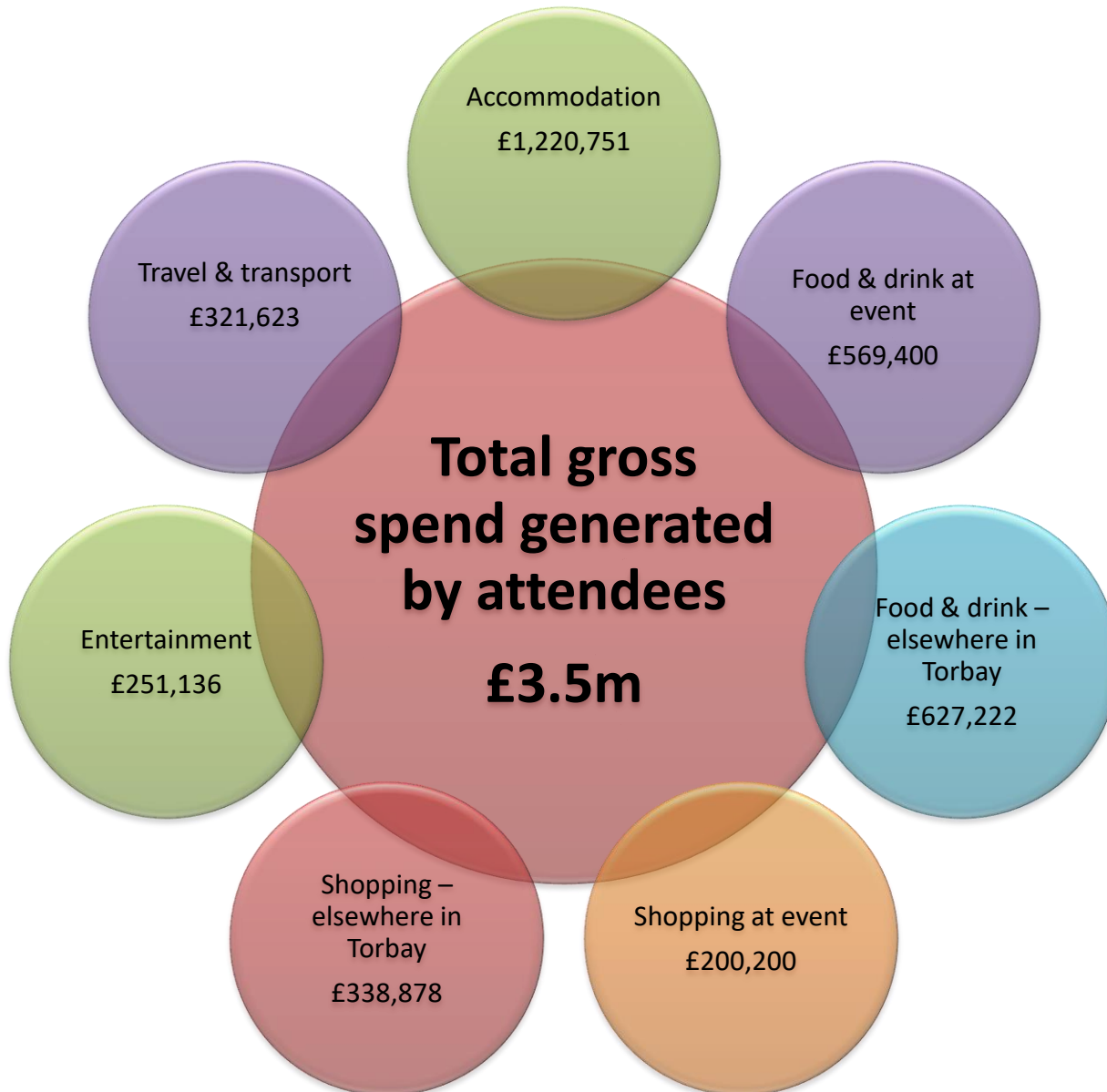
3. Removing what would have happened anyway and leakage

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?



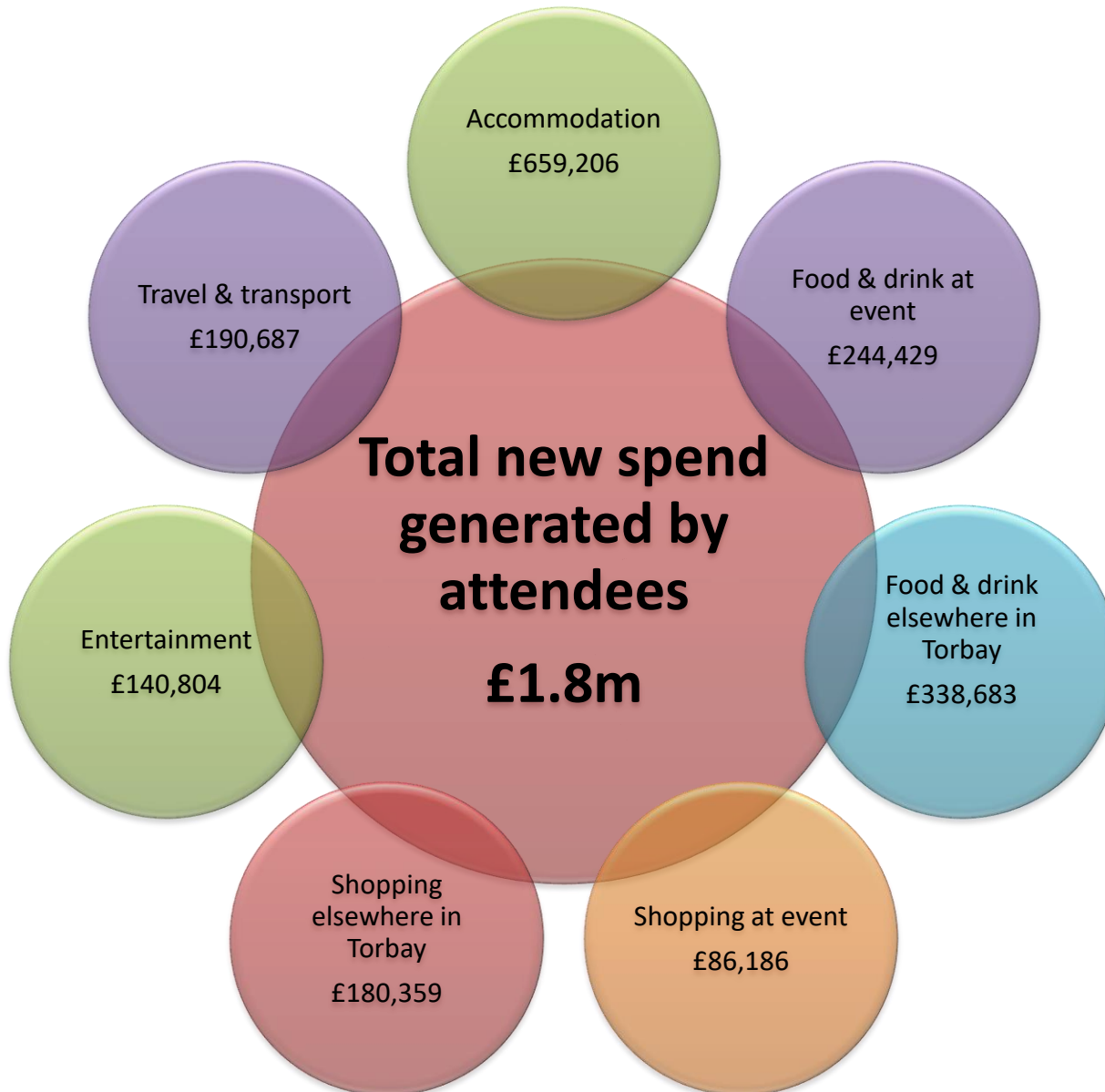
The diagram shows the total gross spend by all those attending the event and includes all spend at the event/Paignton seafront and elsewhere in Torbay on the day of visit plus staying visitor spend in Torbay for the entire length of their stay. Attendees also spent money on event programmes (approximately £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).

In addition 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

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
£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**

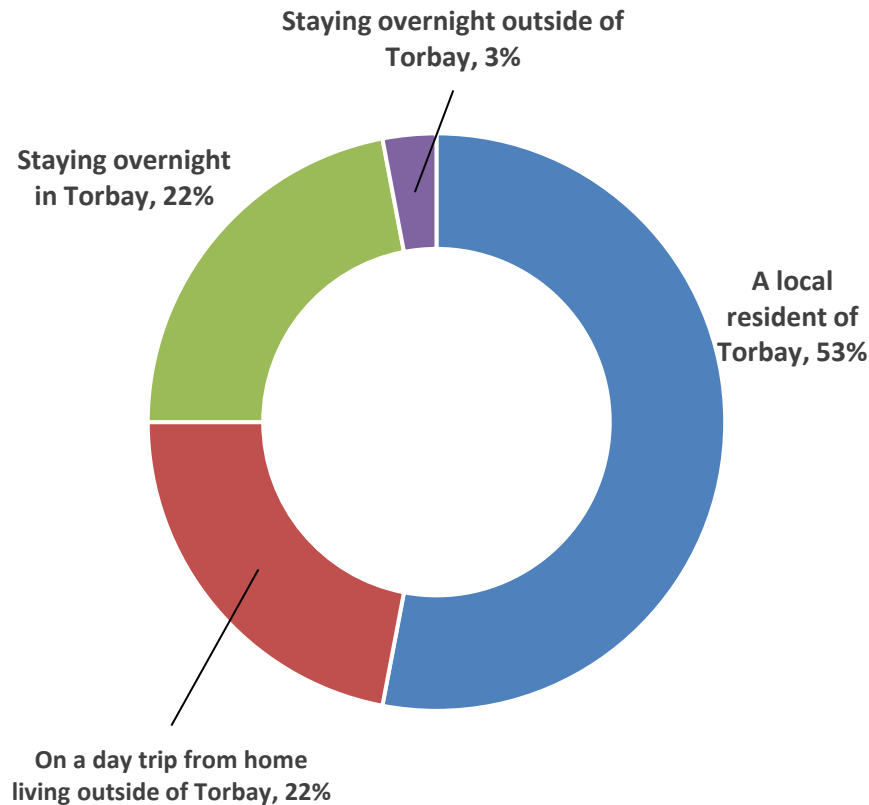
English Riviera Airshow Evaluation 2023

Face to Face Survey Results



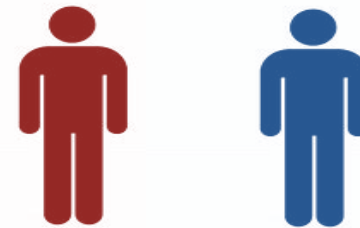
Who visited the event?

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.



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



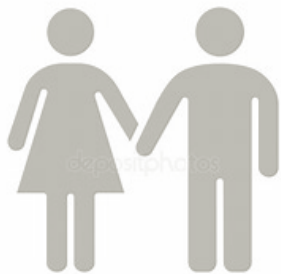
22% adults visiting with children

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.



61% family/friends group with or without children



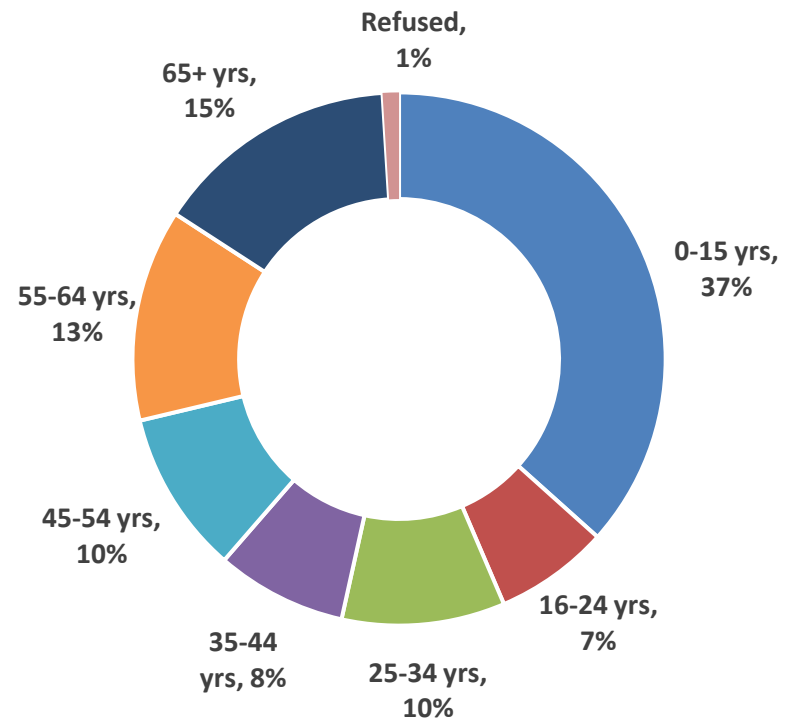
29% spouse/partner



10% alone

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.

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).**

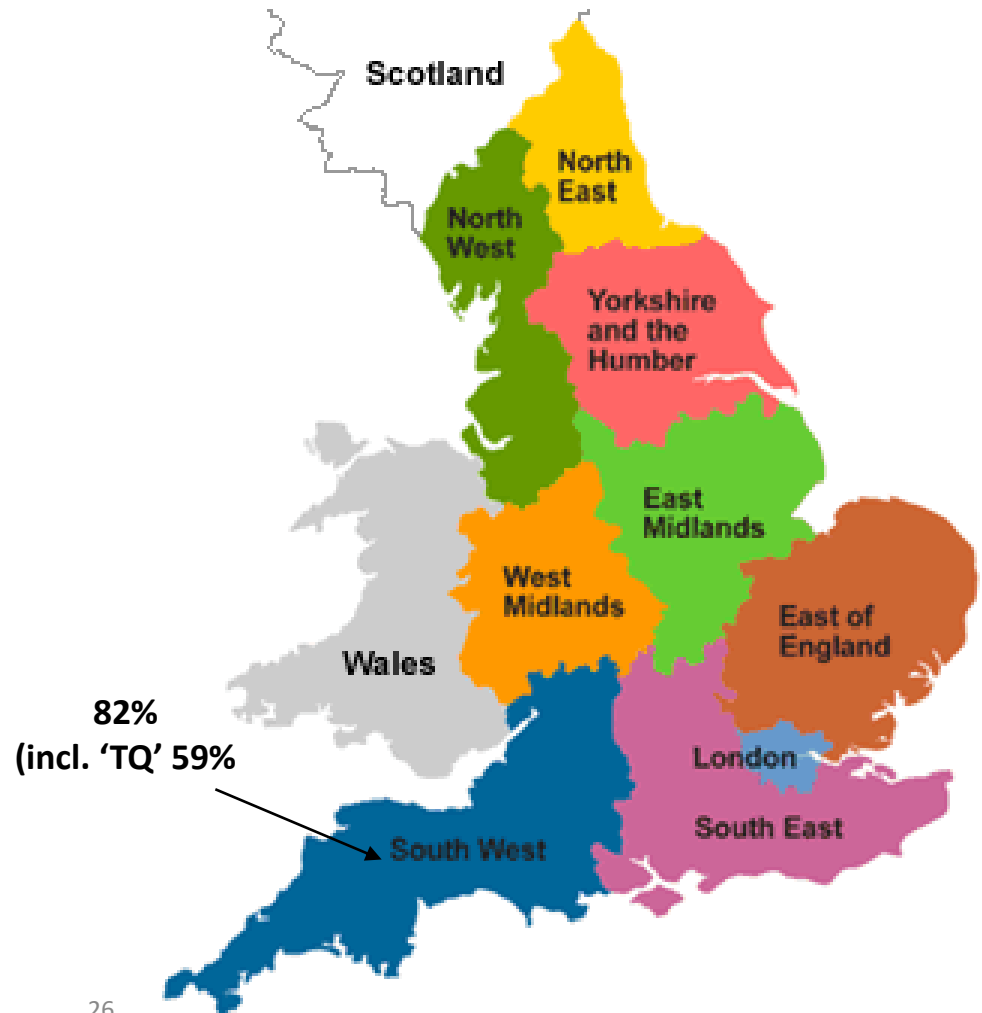


How far did the event reach?

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.

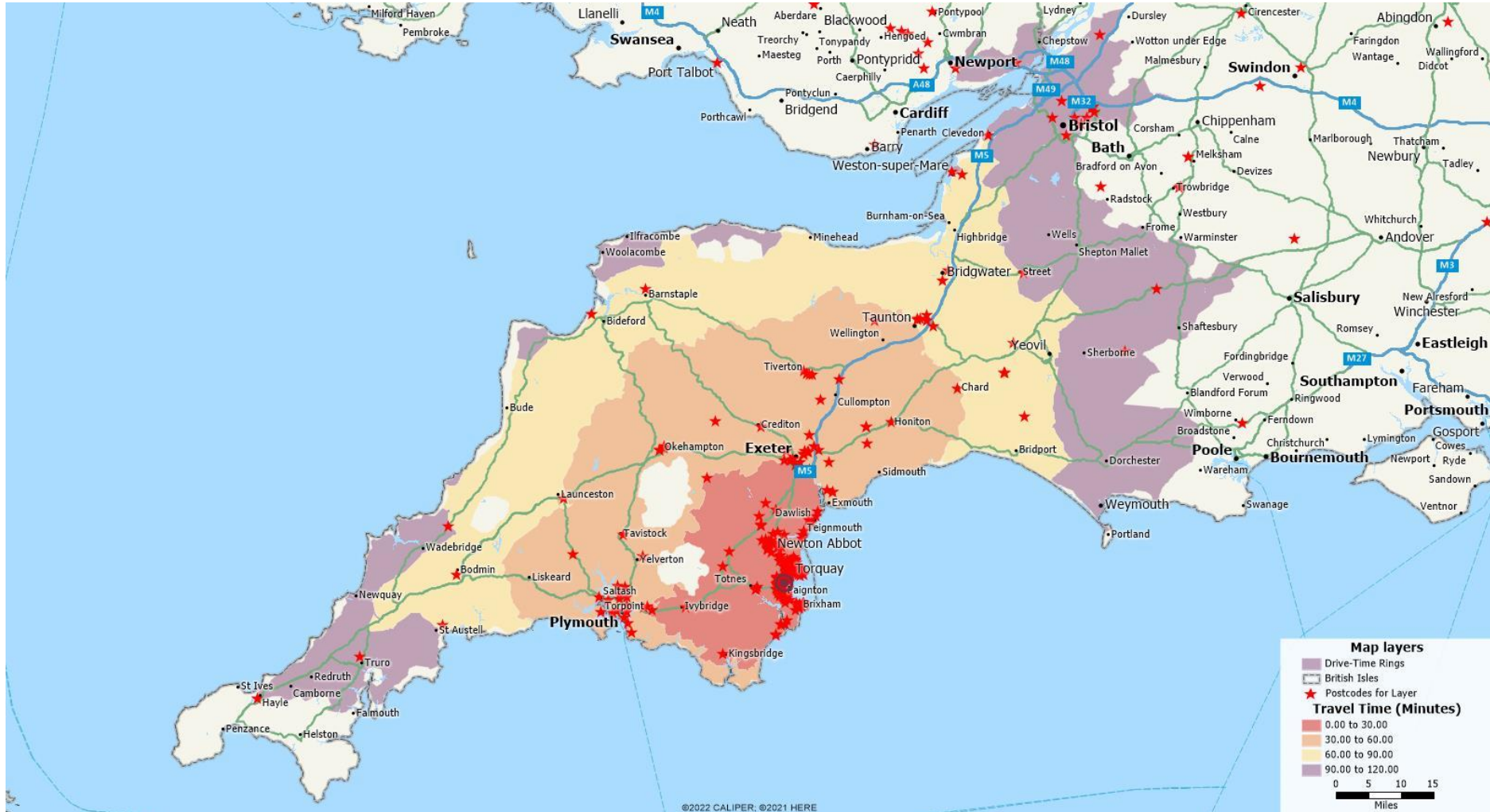
18% of event attendees lived elsewhere in the UK including 2% who lived in postal area 'NP' Newport. There were only 2 overseas visitors captured through the 2023 survey. 1 lived in Australia and the other in South Africa.

Postal code area		
TQ	Torquay	59%
EX	Exeter	8%
PL	Plymouth	5%
TA	Taunton	3%
BS	Bristol	2%
NP	Newport	2%
GL	Gloucester	1%
B	Birmingham	1%
BA	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%
OX	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?

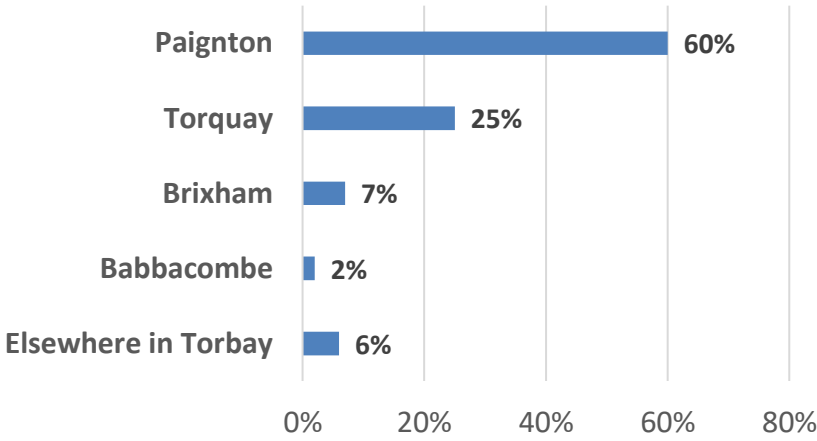
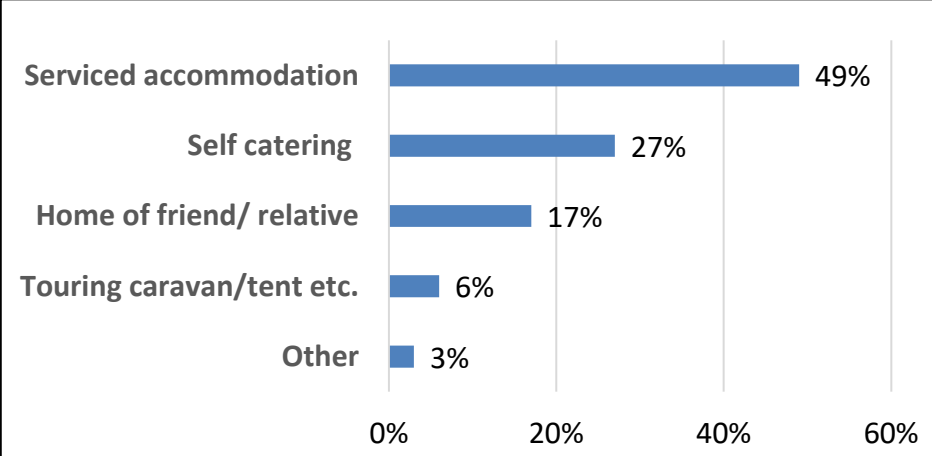


54% of all staying visitors said the Airshow had been the main reason for them choosing to stay in Torbay.



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

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.



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.

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



Average length of stay 3.69 nights



Average spend per person per night £31.91

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

How did staying visitors travel to Torbay?



86% car/van/motorcycle

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.



2% train



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



2% Plane

1% Other



56% petrol

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.



39% diesel



**5% electric
(incl. hybrid)**

**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.

86% main reason for visit on the day of interview



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



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.

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**



4% train

1% bicycle

1% boat

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.

59% petrol



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

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

36% diesel



5% electric

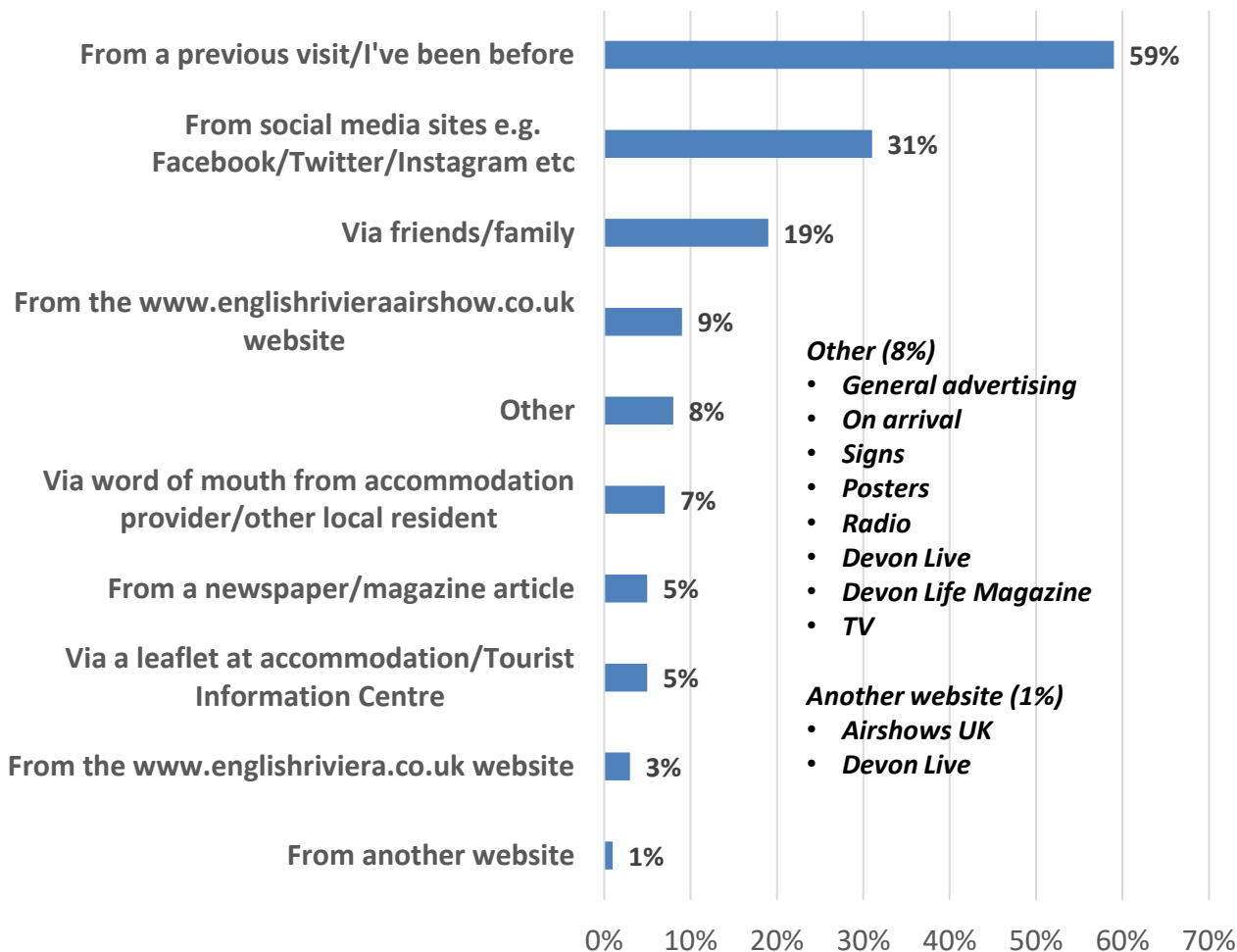


**Average miles travelled to
the event site on the day of
visit (all modes of transport)
was 16.**

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

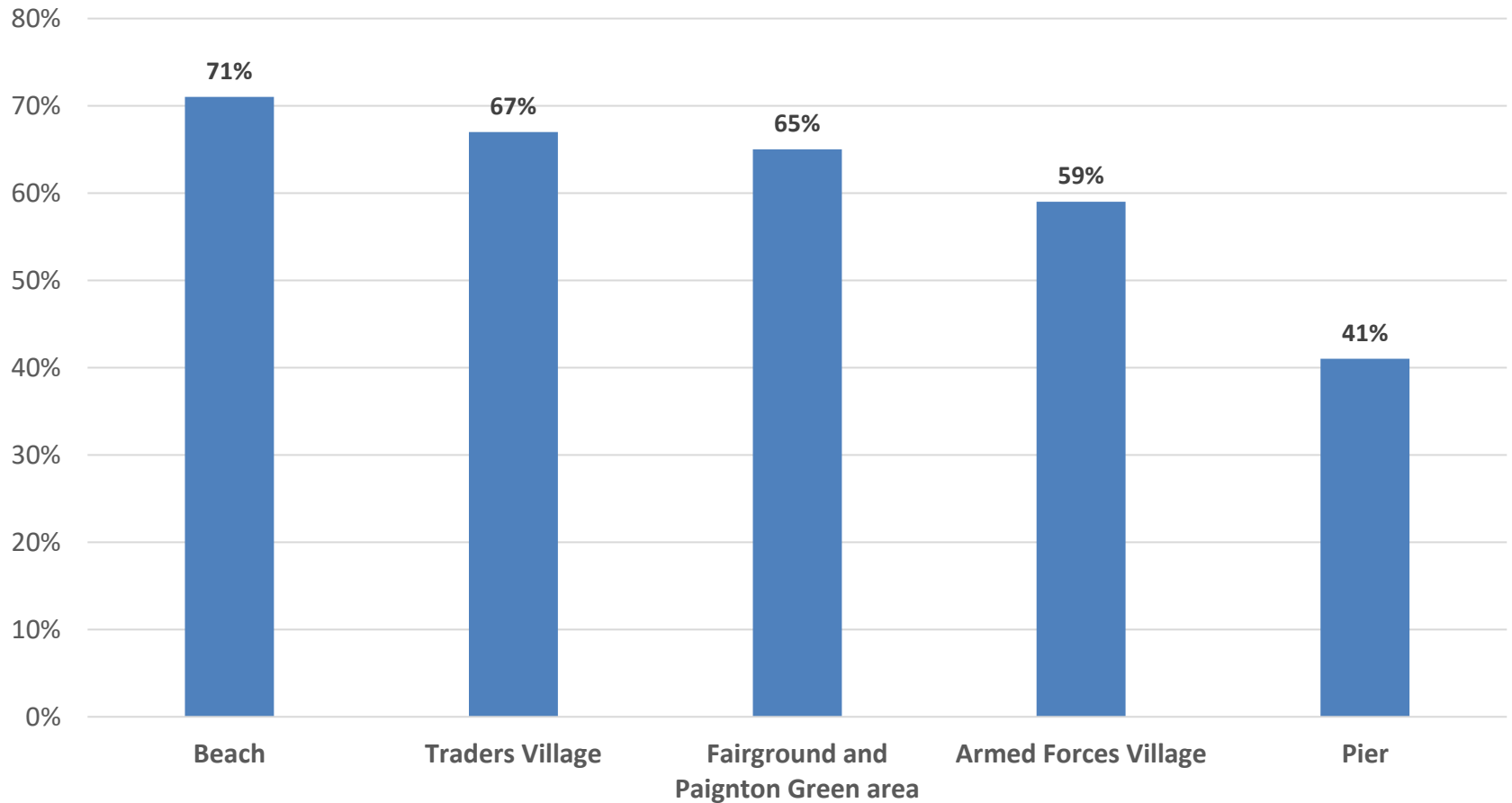
39% attended both days
(55% of those staying overnight in Torbay)

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
16% 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"



86% strongly agree/agree

3% neutral

12% disagree/strongly disagree

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



19% strongly agree/agree

15% neutral

66% disagree/strongly disagree

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



84% strongly agree/agree

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.



£ 8.76

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



£ 4.40

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.



£ 3.08

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



£ 2.33

Ave. spend per person on
Shopping
ELSEWHERE IN TORBAY

How much did event attendees spend?



£ 2.10

Other entertainment/activities
Ave. spend per person



£ 2.06

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

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English Riviera Airshow Evaluation 2023

Local Business Survey Results



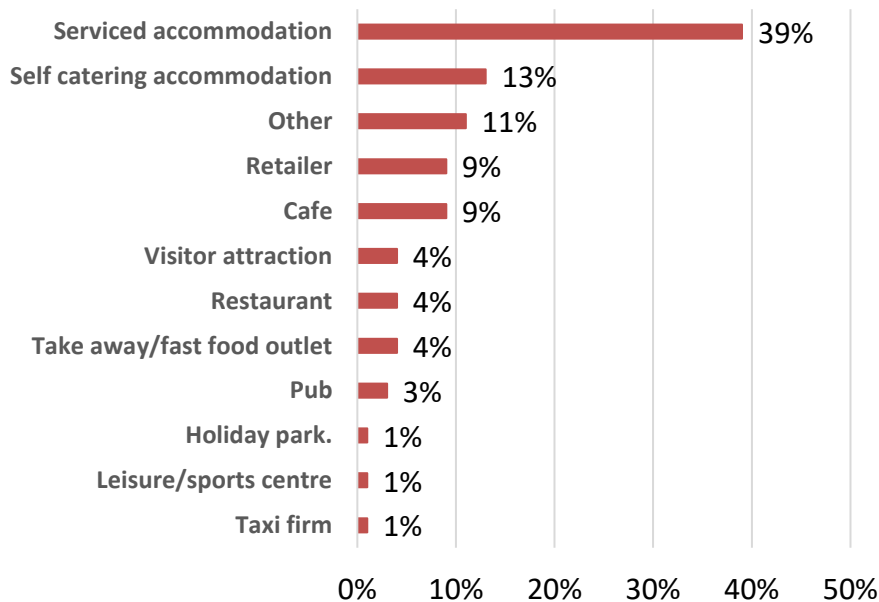
What was the type and location of businesses responding?

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.

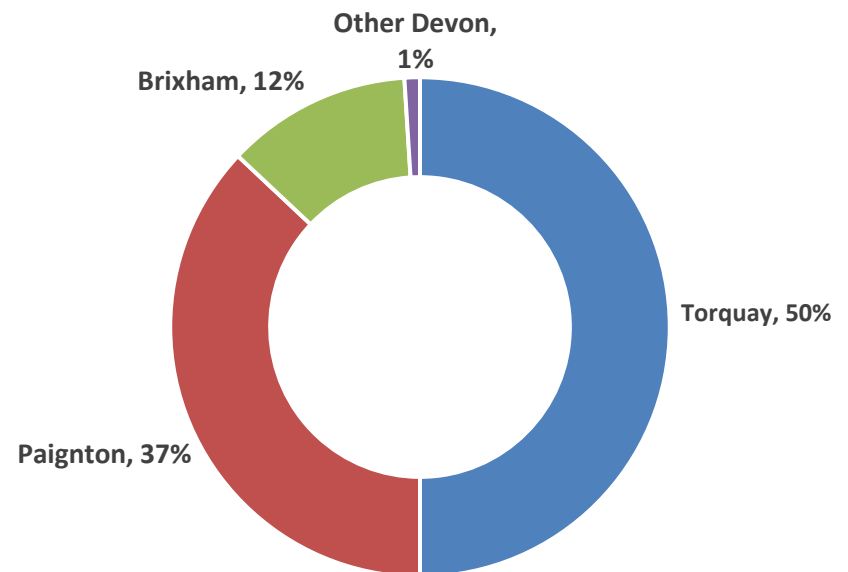
39% of businesses were serviced accommodation providers and 13% ran a self catering business. 9% in each case were a retail business or café. 4% in each case were a visitor attraction, restaurant or take-away/fast food outlet. 3% were a pub and 1% in each case were a holiday park, leisure/sports centre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

Main type of business



Location where business is based

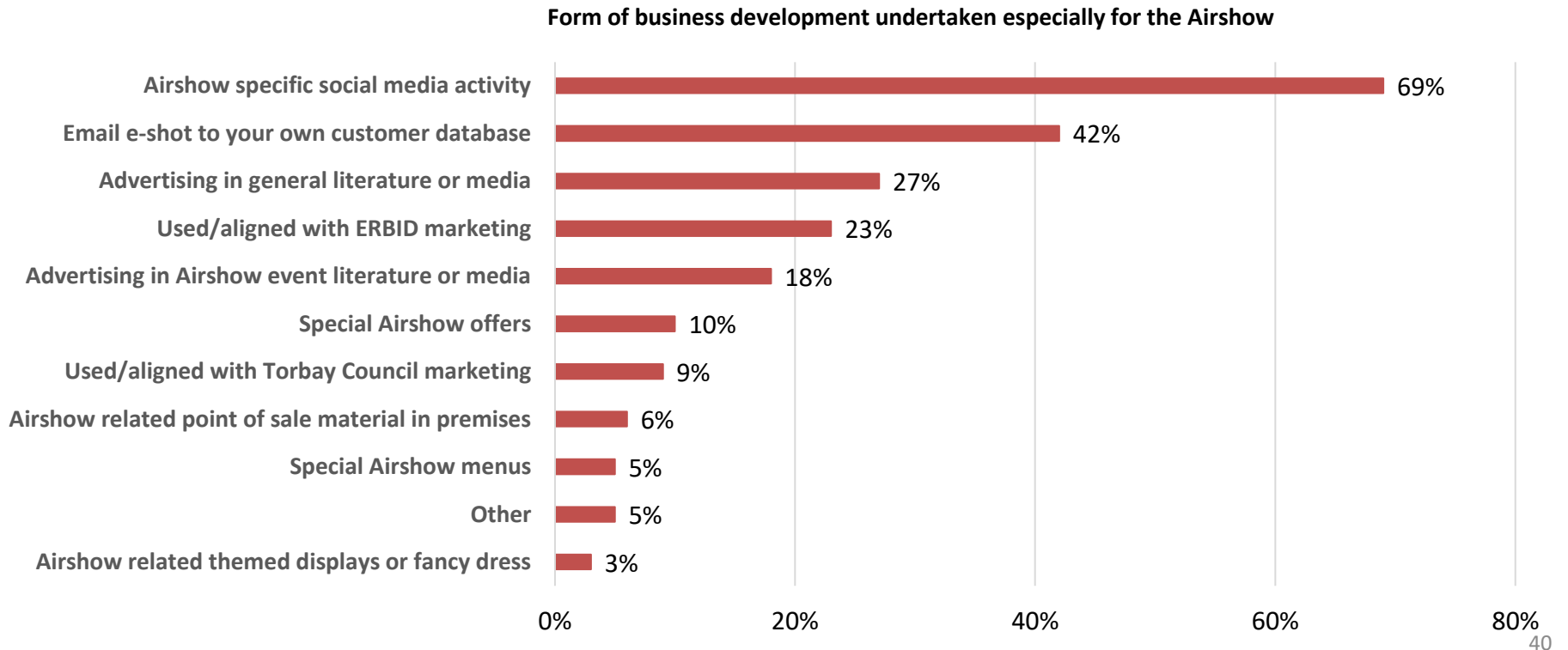


Did businesses undertake any form of business development especially for the Airshow?

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.

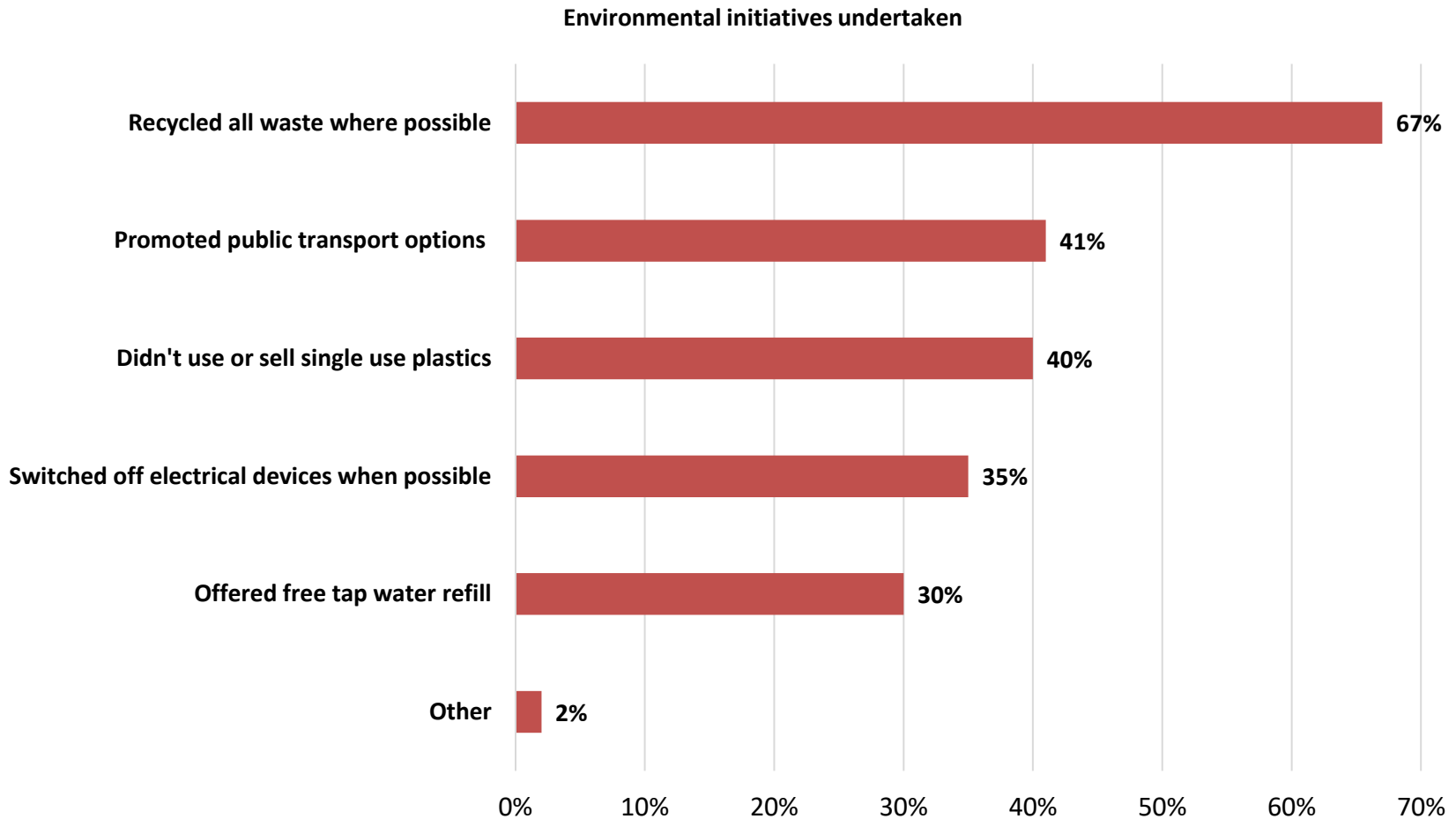
5% said they did some other form of business development especially for the Airshow.



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.



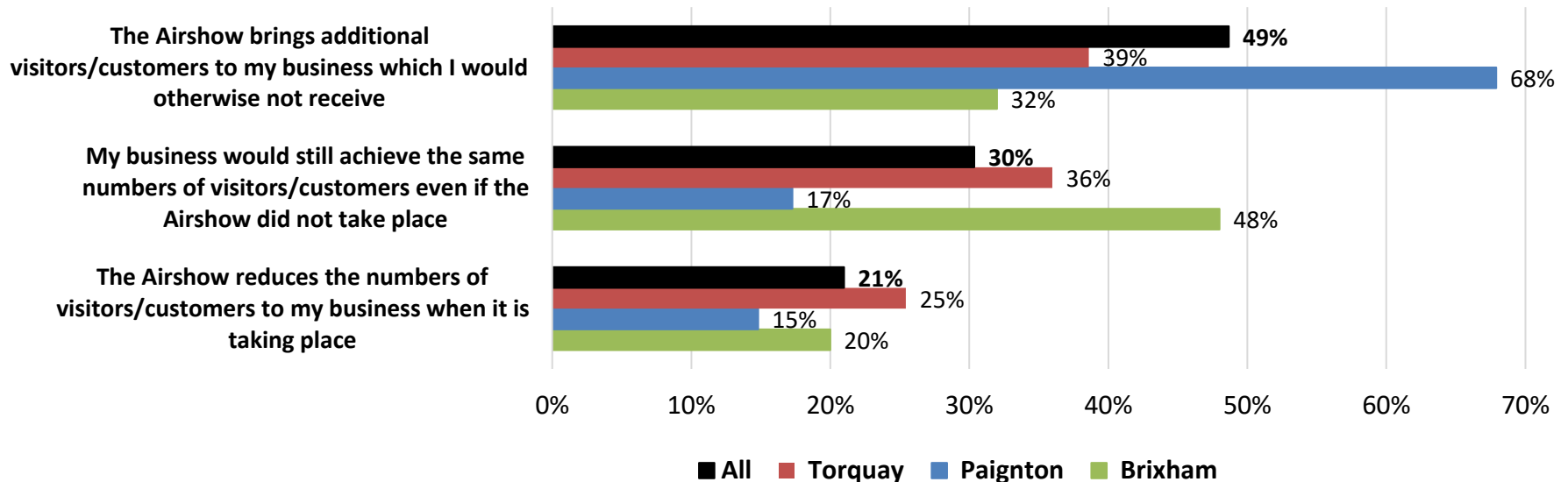
How the Airshow affects visitors/customers received during the period when the festival takes place by location?

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 the numbers of visitors/customers received during the period when the festival takes place by business location

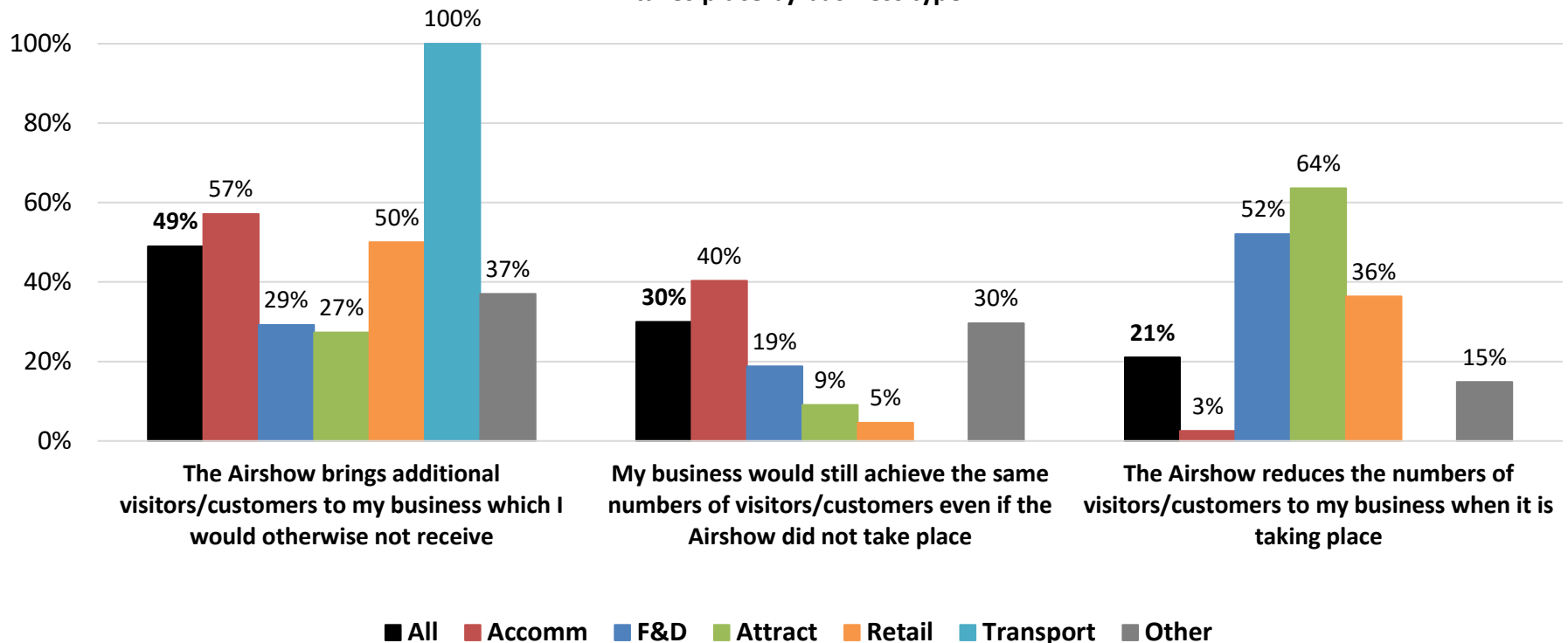


How the Airshow affects visitors/customers received during the period when the festival takes place by type of business?

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.

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



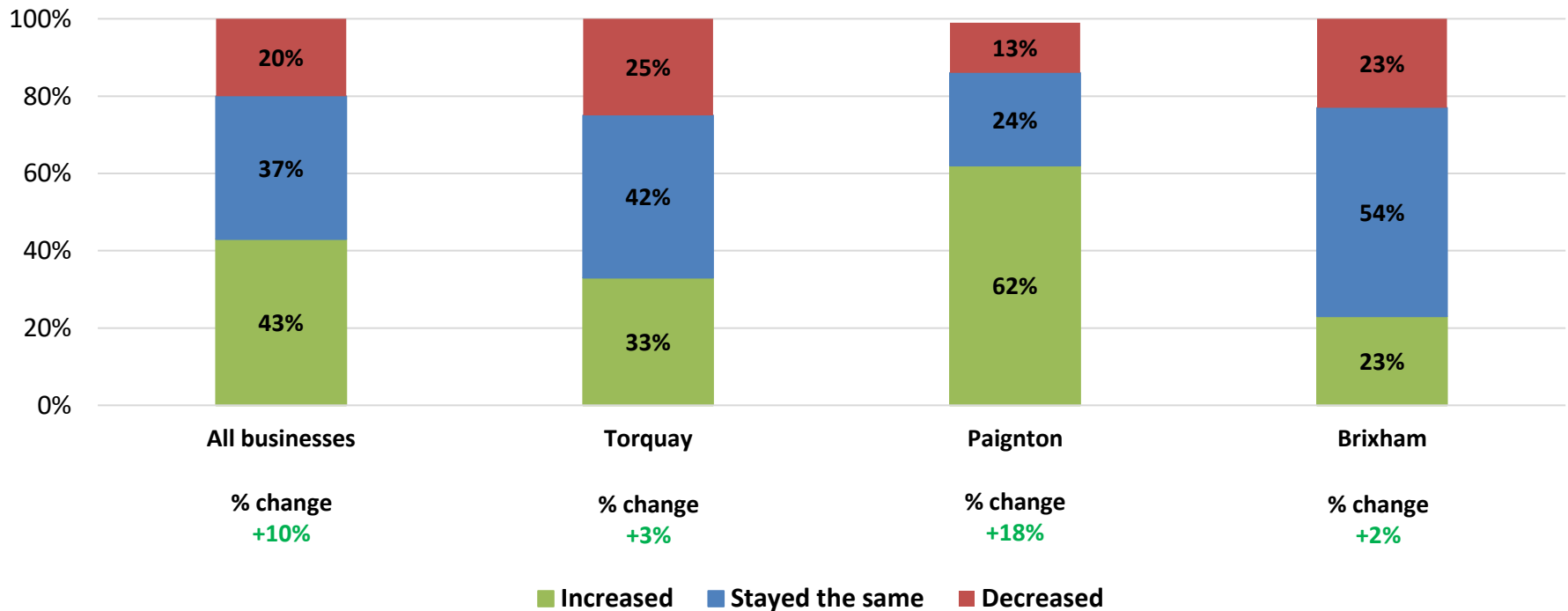
What was the impact of the Airshow on the number of visitors/customers by location?

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.

Impact of the Airshow on visitors/customers by business location



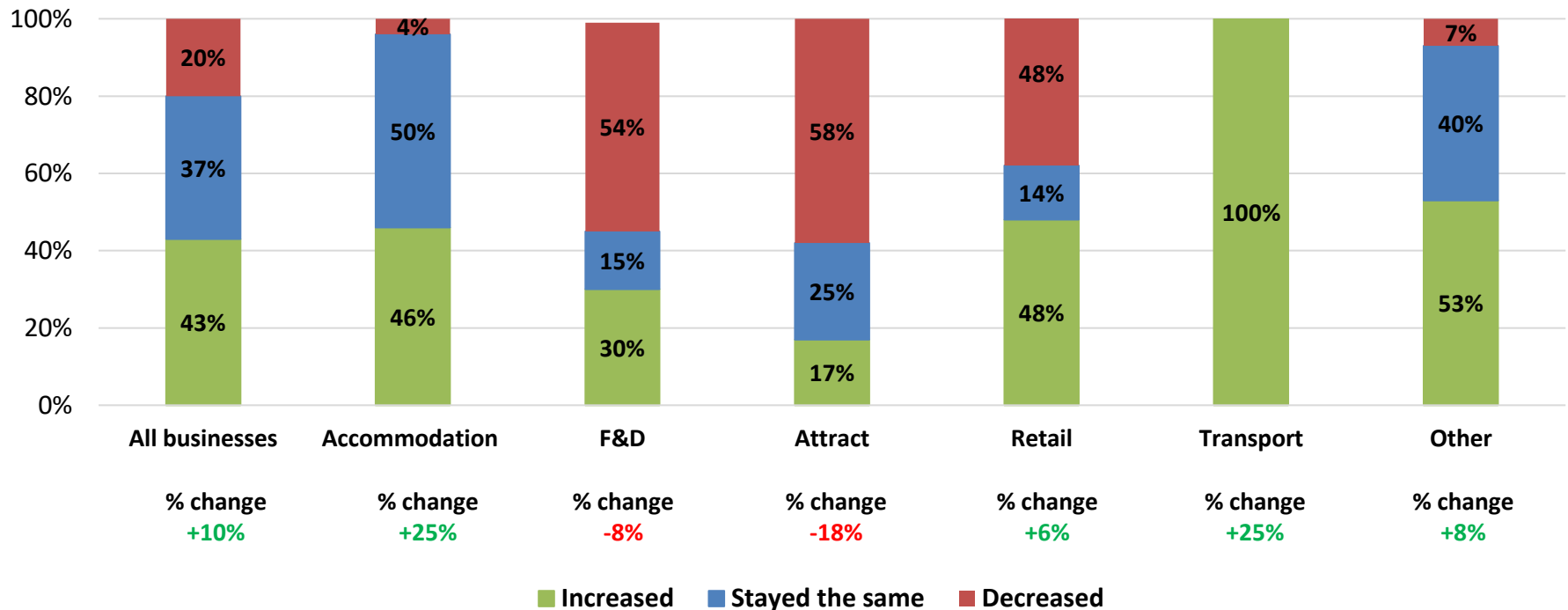
What was the impact of the Airshow on the number of visitors/customers by type of business?

46% of accommodation businesses reported increased visitors/customers during the Airshow whilst 50% said their visitor/customer 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.

Impact of the Airshow on visitors/customers by business type



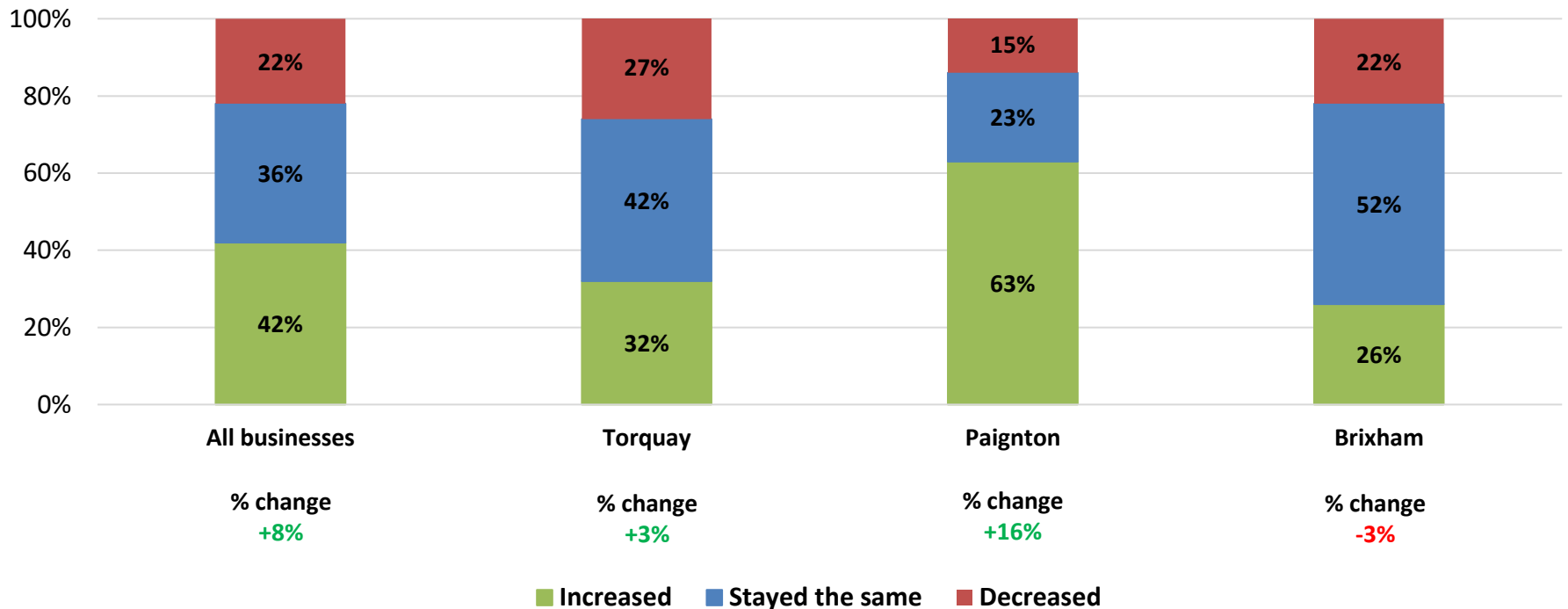
What was the impact of the Airshow on businesses turnover by location?

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%.

Impact of the Airshow on turnover by business location



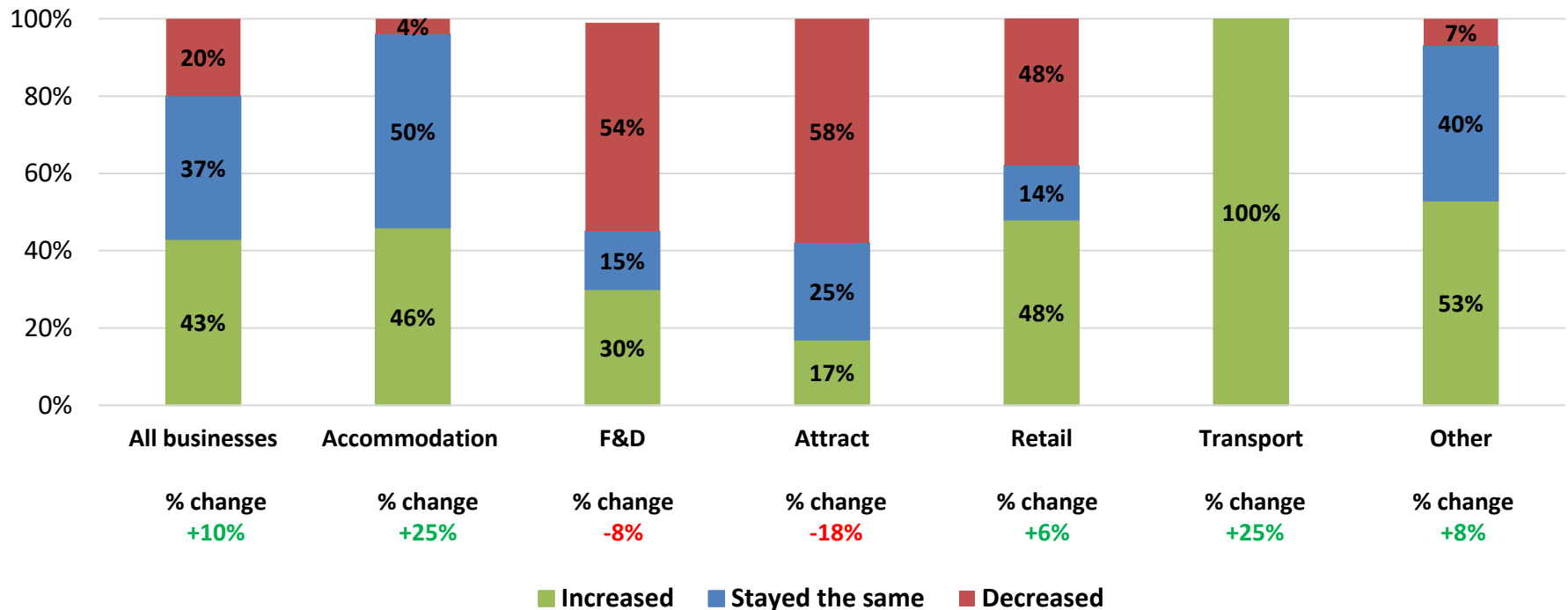
What was the impact of the Airshow on business turnover by type of business?

46% of accommodation businesses reported increased visitors/customers during the Airshow whilst 50% said their visitor/customer 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.

Impact of the Airshow on visitors/customers by business type



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



15%

Extended opening hours



7%

Increased prices



15%

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”



77% strongly agree/agree

14% neutral

8% disagree/
strongly disagree

“The Airshow causes unnecessary littering, traffic congestion and pollution”



23% strongly agree/agree

27% neutral

50% disagree/
strongly disagree

“The Airshow is of great importance to my business”



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

“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
<i>“This Airshow brings about a sense of local/civic pride in the area”</i>	75%	15%	9%	83%	9%	8%	66%	28%	7%
<i>“The Airshow causes unnecessary littering, traffic congestion and pollution”</i>	24%	27%	49%	23%	21%	56%	21%	48%	31%
<i>“The Airshow is of great importance to my business”</i>	33%	31%	37%	63%	21%	17%	31%	34%	35%
<i>“The Airshow is of great importance to the local economy”</i>	71%	18%	10%	84%	13%	3%	72%	17%	10%
<i>“The Airshow is of great importance to the overall image of the local area”</i>	73%	18%	9%	86%	9%	5%	69%	24%	7%
<i>How satisfied were you with the way this years’ Airshow was run?</i>	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 not just Paignton. This will benefit the wider area of Torbay as a destination.

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.

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

Offer a better park and ride facility.

More advertising throughout the Bay not just Paignton.

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.

Increase national marketing activity. Improve Airshow website - limited info and updates.

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

Maybe let local businesses know how they can get involved. Maybe stalls on Paignton Green or something.

Better advertising- some of our guests knew nothing about it. They came from Bristol area.

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.

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

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.

Takes away potential customer's from Brixham to Paignton.

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.

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

Local customer kept away due to high volume of traffic etc. Had to close on the Sunday (first time in 13 years) as not worth opening.

Local trade stayed away, parking issues and general disruption.

Bringing in outside caterers killed our business.

Taken people away from Torquay.

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

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

It empties Torquay town centre for two days.

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

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.

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

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

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.

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

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 spectacular. Watching the Red Arrows from Battery Gardens, Brixham was electrifying. Would encourage everyone to see it at least once during their lifetime.

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.

It is always well organised, 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 tidied 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.

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

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

Shame there isn't a different program on day 2 rather than 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.

Generally, was better organised than last year.

It is an extremely important event for the area.

Keep it going Torbay needs the tourism.

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?

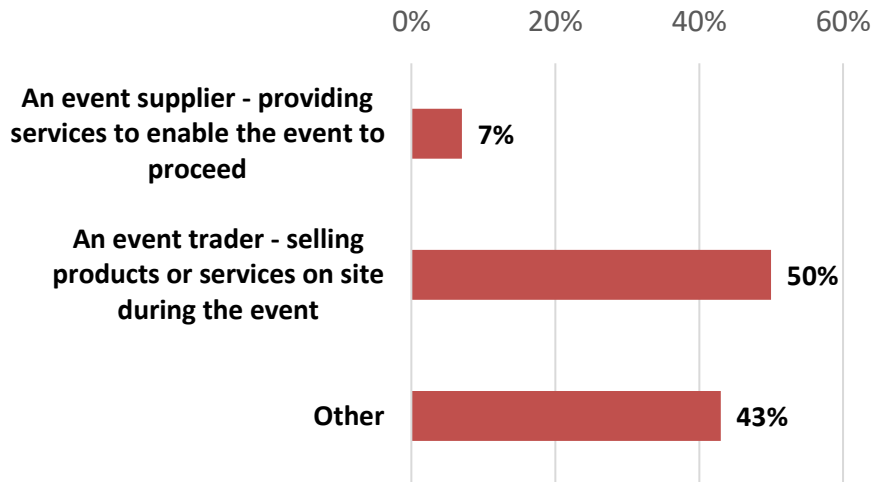
An online survey was distributed to suppliers of the Airshow who provided services which enabled the event to go ahead and traders who were licensed to sell goods onsite at the event. A total of 14 responses were received by the closing date of the 10th July 2023, however, there wasn't a large amount 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).

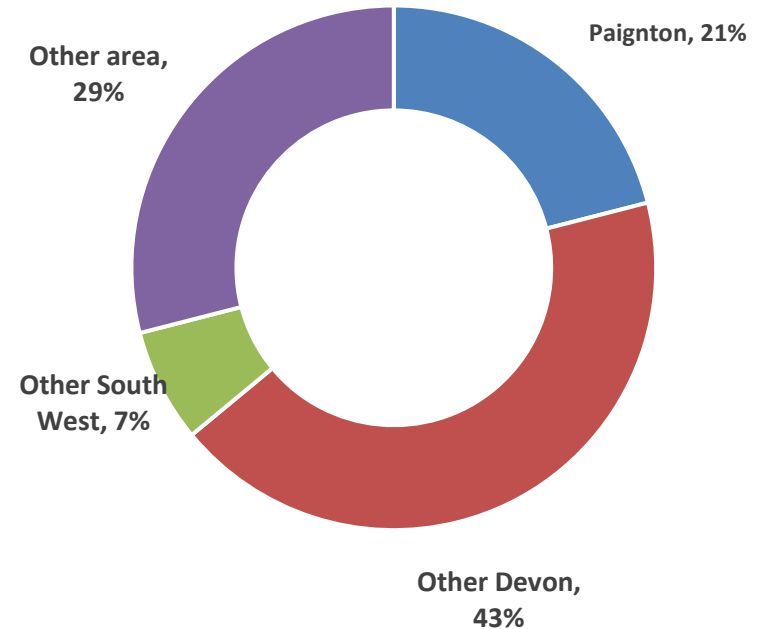
43% of businesses were from other areas of Devon outside of the Torbay Council area and 29% were from other areas. 21% were based in Paignton and 7% from elsewhere in the South West (outside of Torbay or Devon).

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 type



Business location



Did staff stay in the local area?



21%

Suppliers/traders had staff stay in the local area



67%

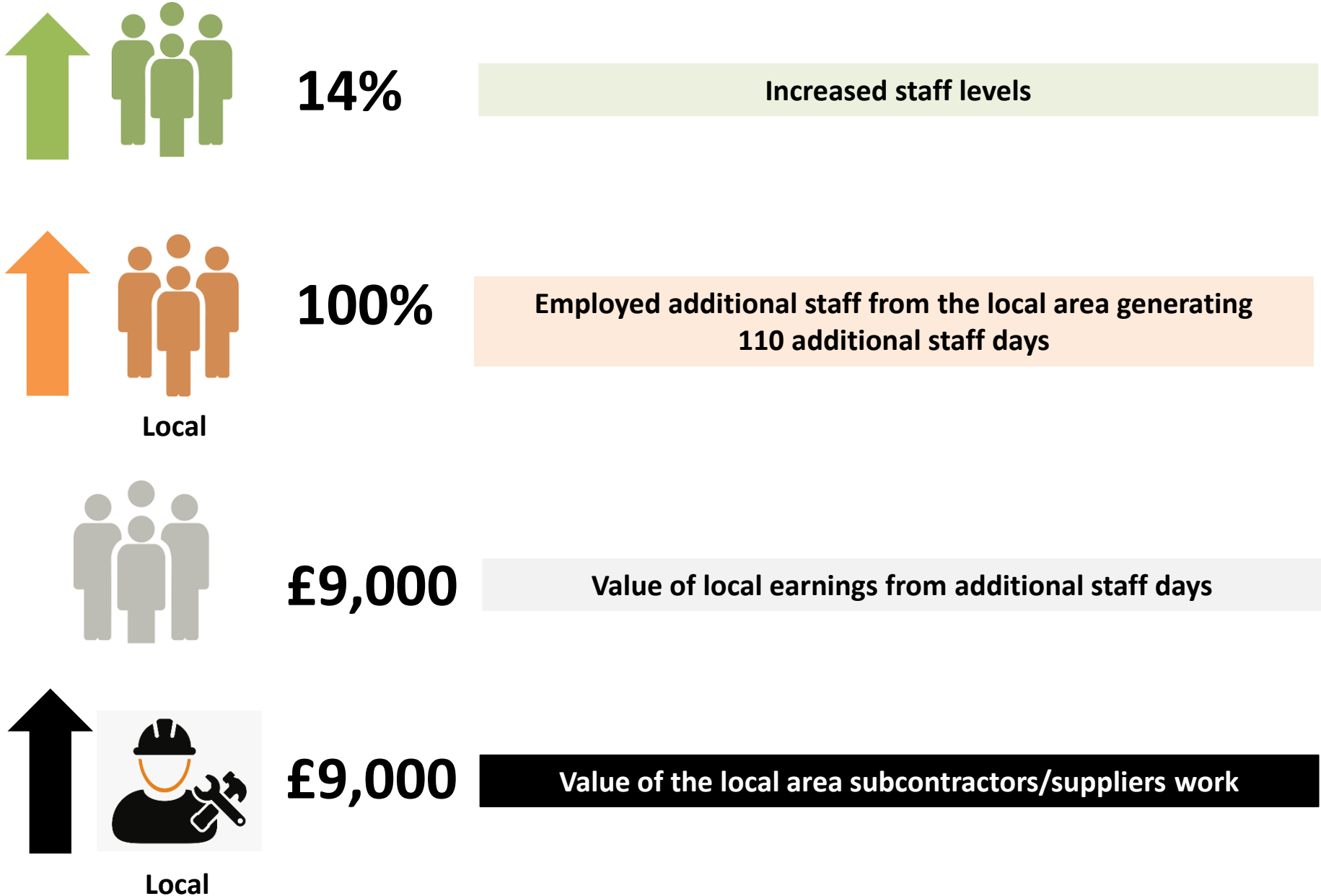
Stayed in serviced accommodation



1,200

Additional value associated with overnight stays

How did suppliers/traders change?



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?



29% very satisfied
/43% satisfied

0% neutral

14% dissatisfied/
14% very dissatisfied

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



50% very satisfied
/36% satisfied

0% neutral

7% dissatisfied/
7% very dissatisfied

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



50% very satisfied
/36% satisfied

7% neutral

7% dissatisfied/
0% very dissatisfied

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

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”



71% strongly agree/21% agree

7% neutral

0% disagree/0% strongly disagree

“The Airshow causes unnecessary littering, traffic congestion and pollution”



0% strongly agree/0% agree

29% neutral

57% disagree/14% strongly disagree

“The Airshow is of great importance to my business”



29% strongly agree/36% agree

36% neutral

0% disagree/0% strongly disagree

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”



57% strongly agree/36% agree

7% neutral

0% disagree/0% strongly disagree

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



57% strongly agree/36% agree

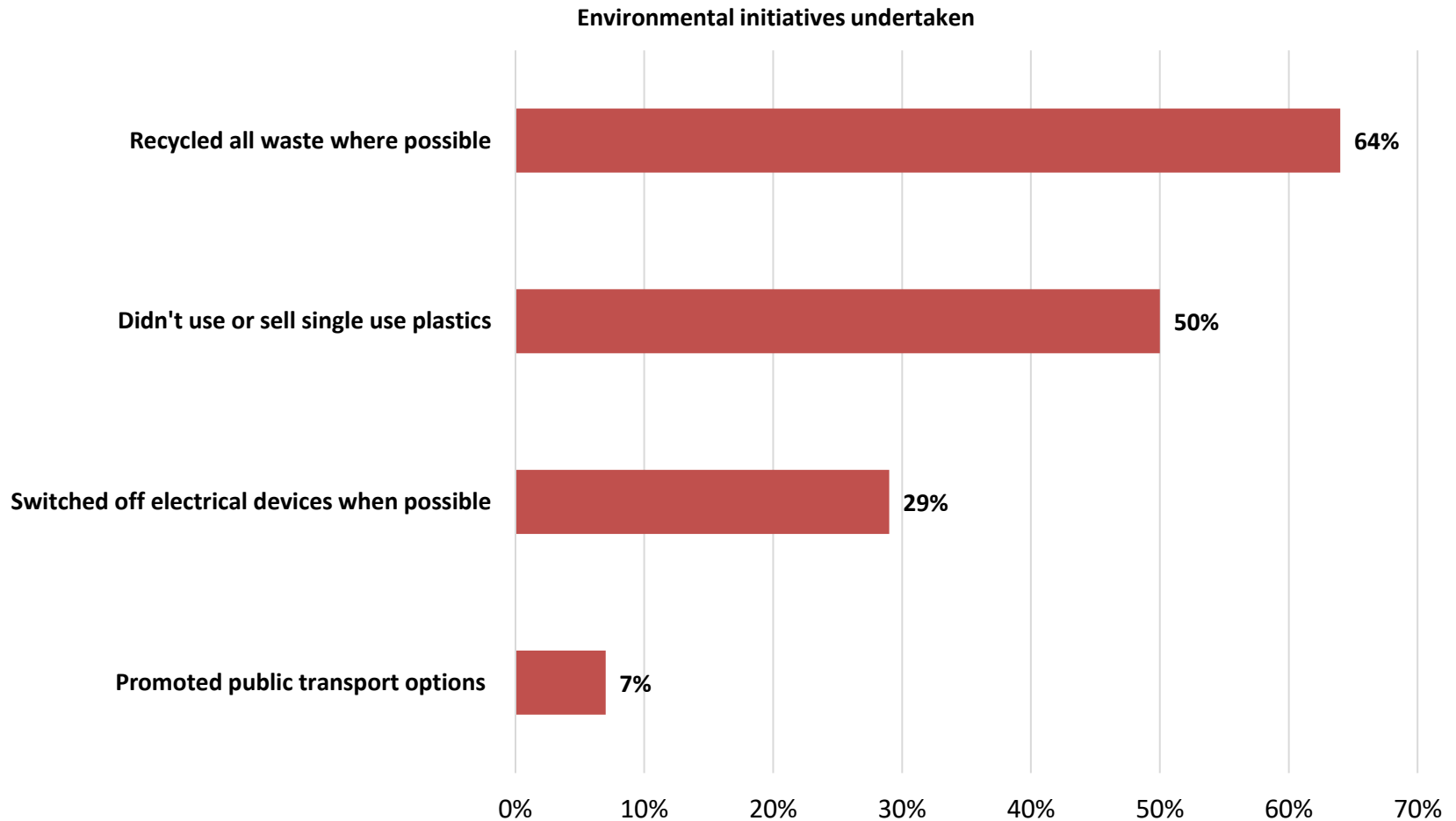
7% neutral

0% disagree/0% strongly disagree

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.

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 staying 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 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.

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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.

The 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 that 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

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