

Falmouth Tall Ships 2014 Evaluation



Final Report



Produced for and on behalf of Visit Cornwall & Falmouth BID
by
The South West Research Company Ltd



November 2014



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Falmouth Tall Ships 2014 Evaluation

Executive Summary



Executive Summary

The South West Research Company Ltd. were commissioned by Visit Cornwall to conduct an economic evaluation of the Falmouth Tall Ships Regatta 2014. The survey was financially supported by Falmouth Business Improvement District (BID).

The basis for this study and the outputs provided are shown below;

- **Attendee Surveys** – 423 on site face-to-face interviews and 760 post event online survey responses received.
- **Business Survey** – 157 responses were received from Falmouth and other Cornwall businesses.
- **Attendee estimates** – Achieved through counts of attendees at numerous sites throughout the regatta.
- **Economic Modelling** – Applying survey data to attendee numbers to estimate economic outputs.

Executive Summary

- The 2014 Falmouth Tall Ships Regatta was held in Falmouth between Thursday 28th and Sunday 31st August 2014.
- Of the total 197,000 people visiting the regatta over the four day period approximately 92,000 are estimated to be unique visitors to the event.
- Total associated event spend is estimated at £20.9 million. This is all spend connected to those attending the event and includes spend at the event for all visitor types and spend away from the event for staying visitors for their entire stay (including accommodation costs).
- The total additional associated event spend is estimated at approximately £12.8 million. This covers all spend at the event for all influenced visitor types and spend away from the event for influenced staying visitors for their entire stay (including accommodation costs).
- The total truly additional associated event spend is estimated at approximately £10.5 million. This relates to the total number of attendees that were influenced to visit both Falmouth and Cornwall by the presence of the Tall Ships Regatta but also takes into account displacement and deadweight i.e. what would have happened anyway had the event not taken place.
- Event related/support workers spend is estimated at approximately £217,000.
- The total Full Time Equivalent jobs (FTE's) supported by the truly additional associated event spending plus the event related/support worker spend was 238 equating to 325 actual jobs.
- The regatta overall returned a healthy £25.89 of additional money into the Cornwall economy for every pound invested which would not have occurred without the presence of the event.

Executive Summary

Attendee survey findings

- 54% of all regatta attendees were Cornish residents. A further 12% lived in the neighbouring county of Devon whilst 8% lived elsewhere in the South West region. 25% lived elsewhere in the UK and 1% were from overseas.
- 51% of all regatta attendees were female and 49% were male.
- The majority of regatta attendees were aged 45+ years (59%). 16% were children aged 0-14 years.
- 68% of regatta attendees visited in adult only groups. The average total group size was 3.09 people.
- Approximately one fifth of attendees (21%) were on holiday staying overnight in Falmouth, whilst a further 17% were staying overnight elsewhere in Cornwall.
- 34% of attendees staying overnight in Falmouth/Cornwall were doing so in serviced accommodation. 21% in each case were staying in self-catering accommodation or at the home of a friend/relative.
- The average duration of stay for those attendees staying overnight in Falmouth was 6.6 nights compared with 7.6 night for those staying elsewhere in Cornwall. This resulted in an overall average length of stay for all staying visitors of 7.15 nights.
- The average spend per person per night on accommodation in Falmouth was £34.64 compared with £20.62 for those staying elsewhere in Cornwall. This resulted in an overall average spend per person per night on accommodation amongst all staying visitors of £26.18.
- The majority of regatta attendees staying overnight in Falmouth/Cornwall (79%) had made their holiday booking during the year of the regatta including 16% during the actual month of regatta (August 2014) and a further 22% during June or July 2014 (11% in each case).

Executive Summary

- Two thirds of all those attendees on holiday staying overnight in Falmouth/elsewhere in Cornwall indicated that the Tall Ships Regatta was the main reason for them choosing to visit Cornwall on this particular occasion.
- Only 11% of attendees indicated that 2014 was the first time that they had visited Falmouth. The majority of previous visitors to the town had visited on 5 or more previous occasions (77%). 65% of previous visitors to Falmouth had last visited the town earlier in 2014 and 16% during 2013.
- 55% of attendees indicated that this was the first time that they had attended a Tall Ships event in Falmouth. 82% of attendees who had visited a Tall Ships event in Falmouth previously had attended the 2008 regatta when it was last hosted in the town.
- 74% of all attendees indicated that the Tall Ships Regatta was the main reason for them choosing to visit Falmouth on the day they were interviewed/attended an event.
- 97% of all attendees (excluding local residents of Falmouth) indicated that they will visit Falmouth or other parts of Cornwall again in the future.
- The most popular activities participated in whilst on holiday were eating & drinking (89%), visiting festivals and events (74%), going for a short walk (70%), going shopping (65%), going for a long walk (57%) and swimming in the sea (49%).
- The largest proportions of attendees (44% for information about visiting Falmouth and 55% for information about visiting the Tall Ships Regatta) had sourced information on the www.falmouthtallships.co.uk website. A further 26% of attendees had sourced information about visiting Falmouth via a recommendation/word of mouth compared with 31% of attendees when sourcing information about visiting the Tall Ships Regatta.
- 78% of internet users had used it to source information only whilst 15% had used it to source information and to book their accommodation and 7% to source information and to book car hire/flights/attraction tickets etc.

Executive Summary

- 39% of internet users who used it to book their accommodation, car hire etc. had used their accommodation providers website to do so.
- 63% of internet users had used an internet search engine. 28% had used the www.visitcornwall.com website and a further 16% the www.falmouth.co.uk website.
- 47% of internet users indicated that they had used Facebook, 30% a tourist board website and 23% had used email to find out local information while they were on holiday.
- 'Events' information (67%), 'Things to do' information (56%), 'Where to go' and 'Attractions' information (50% in each case) and 'maps' (49%) were considered the most useful to access whilst on holiday.
- Around a quarter of attendees (24%) were aware that BT Cornwall was the principle sponsor of the event and the same proportion were aware of the company before attending the Tall Ships Regatta in Falmouth.
- Three quarters of attendees (online survey only) said BT Cornwall's sponsorship of the event made no difference to their opinion of the company whilst 24% said it changed their opinion of them for the better. 1% of attendees said it changed their opinion of BT Cornwall for the worse.
- Just 3% of attendees had visited the BT Cornwall Alfi stand during the regatta.
- 54% of all attendees had travelled to Falmouth by car, van, motorcycle etc., whilst a further 23% had walked from their homes/accommodation. 9% of all attendees arrived by train.
- 29% of all attendees had attended just one day of the regatta. A further 48% of all attendees had visited on two or three event days and 23% on all four days of the regatta.
- Average duration of stay at the regatta ranged from 4 hours 47 minutes on Thursday 28th August to 5 hours 24 minutes on Sunday 31st August.

Executive Summary

- Events square (77%) and the Docks (74%) were the most popular sites visited across all four days of the event, followed by Custom House Quay (53%).
- Attendee satisfaction levels were highest for the overall enjoyment of their visit to Falmouth (4.73) and lowest for the quality of the information provision, although all indicators received very high satisfaction scores of 4.12 or higher.
- Online survey attendees were also asked to rate their levels of satisfaction with a number of indicators relating to their experience of the Tall Ships Regatta. Satisfaction levels were highest for the general atmosphere of the Regatta (4.81) and lowest for the cost of parking during the event. Only two other indicators; the availability of car parking and of public transport during the event (3.76 and 3.96 out of 5.00 respectively) received average satisfaction scores of less than 4.00. 7 out of the 10 indicators explored for the event received an average satisfaction score of 4.22 out of 5.00 or higher.
- The Falmouth Tall Ships Regatta, Falmouth and Cornwall all received very high recommendation scores of between +72% and +84% on a measure that can range from -100% to +100%. The highest recommendation score was for Cornwall (+84%).

Executive Summary

Business survey findings

- 29% of the businesses responding to the survey were town centre retailers in Falmouth. A further 26% were food or drink establishment and 17% were serviced accommodation providers.
- 96% of the businesses responding to the survey were located in Falmouth.
- 78% of the businesses responding to the survey had business outlets in Falmouth only.
- 40% of businesses surveyed had extended their opening hours as a result of the Tall Ships Regatta taking place.
- Overall, 65% of businesses participating in the survey indicated that the event had impacted on their business turnover. 86% saw a positive impact and 14% a negative impact.
- The average actual value of the increase in turnover as a result of the regatta was estimated at £10,097. The average actual value of the decrease in turnover was estimated at £5,138.
- Overall, 47% of businesses indicated that they had increased their levels of staff during the regatta. The average number of additional staff employed was 3.03 or 8.68 additional staff days.
- Overall, 64% of businesses indicated that their business turnover had remained the same/normal in the week commencing 18th August 2014 in the run up to the start of the event on the 28th August 2014. A further 32% said their turnover had increased and 4% that it had decreased.
- The average actual value of the increase in turnover the week before the regatta was estimated at £5,061. The average actual value of the decrease in turnover was estimated at £4,660.

Executive Summary

- A further 62% of businesses indicated that their business turnover had remained the same/normal in the week after the event (w/c 1st September 2014). A further 24% said their turnover had increased and 13% that it had decreased.
- The average actual value of the increase in turnover the week before the regatta was estimated at £6,506. The average actual value of the decrease in turnover was estimated at £3,650.
- 45% of businesses had undertaken some form of business development as a result of the Tall Ships Regatta taking place.
- Two thirds of businesses undertaking some form of business development as a result of the Tall Ships Regatta taking place had undertaken extra advertising/promotion whilst 54% had introduced extra products/lines during the event. A third had undertaken special exhibitions or displays as a result of the event.
- 11% of businesses responding to the survey were part of the town working group for the Tall Ships Regatta 2014. A further 18% of businesses had sponsored or supported the event in some way.
- 41% of businesses responding to the survey indicated that the Tall Ships Regatta 2014 had affected their suppliers, 47% that it had affected their customers, 22% their employees ability to work normally and 24% their own ability to work normally.
- 72% of businesses said the overall impact of the regatta on their business had been 'very positive' (50%) or 'fairly positive' (22%). 17% said the event had no impact at all on their business and just 10% that it had impacted 'fairly' negatively (7%) or 'very negatively' (3%).
- 87% of businesses felt that the regatta was of great importance to the economy of Falmouth and a further 11% of some importance. 2% felt it was of no importance to the economy of the town.
- Overall, 89% of businesses felt that the regatta was of great importance to the overall image of Falmouth and a further 10% of some importance. Just 2% of businesses felt the regatta was of no importance to the overall image of the town.

Falmouth Tall Ships 2014 Evaluation

Conclusions & Recommendations



Conclusions & Recommendations

The results of this survey clearly highlight the huge importance of the Tall Ships Regatta to the economy of Falmouth and Cornwall. The regatta was very highly regarded, supported and enjoyed by both residents of Falmouth and Cornwall and visitors from outside of the area. It is also clear that the event successfully and positively engaged local residents and businesses alike giving them a sense of pride in their local area and who largely considered it to be of great importance to the general economy and overall image of the town.

There is no doubt that every effort should be made to ensure the town hosts the Tall Ships Regatta again in the future for the benefit of the local economy and residents of Falmouth and Cornwall

The Tall Ships Regatta;

- ✓ Attracted approximately 197,000 attendees in total over the four days of the regatta equating to 92,000 unique event attendees. This figure compares with a police estimate for the four days of 250,000 attendees. However, it is widely acknowledged that historically police estimates tend to over-estimate attendance at such events.
- ✓ Generated in excess of £20.9 total event expenditure to the local and wider economy of Cornwall, £12.8 million of which was considered additional expenditure and £10.5 million of which was truly additional expenditure which would not have been generated had the regatta not taken place.
- ✓ Was an extremely well supported event with very high levels of satisfaction amongst attendees.
- ✓ The total Full Time Equivalent jobs (FTE's) supported by the truly additional associated event spending was 238 equating to 325 actual jobs.
- ✓ The regatta overall returned a healthy £25.89 of additional money into the Cornwall economy for every pound invested which would not have occurred without the presence of the event.

Whilst the results of this evaluation are, on the whole, extremely positive, there is always room for improvement in the delivery of such events.

Should the Tall Ships Regatta be hosted again in Falmouth again in the future, it is essential that the event organisers strive for continuous improvements to the event programme to ensure the high level of satisfaction and support for the regatta remains amongst attendees and businesses alike.

Local business support and community engagement in the regatta should remain a highly focussed objective for the future as without their co-operation and support the event would probably not have been the huge successful that it was. In particular, ensuring early input into the regatta at the planning stage and well in advance of the actual event taking place will ensure everyone has plenty of time to prepare and get involved and help to minimise any detrimental affects on local residents and businesses of Falmouth over the four days of the event.

Conclusions & Recommendations

In addition, retaining the 'local' feel of the festival is key to its success and also in gaining the support for the regatta of the local businesses. Plans for the festival should include as much consultation as possible with the local traders to try to ensure that any negative impacts of the regatta are addressed.

Whilst fixed by the Regatta Race organisers and largely out of the control of the local event organisers in Falmouth, much consideration and thought should be given to the future timing of the event. Whilst Falmouth was full to capacity over the duration of the regatta it is highly probable that it would have been very busy anyway at the end of August during the peak tourist season regardless of the event taking place. And whilst the regatta generated large numbers of visitors what is unknown, and cannot be estimated or accounted for in this evaluation, is whether it potentially deterred other visitors from coming to the town due to the scale and size of the event and concerns over finding accommodation, being overcrowded etc. It should be considered that whilst a different, outside the peak period timing of the event might attract fewer visitors it could potentially bring more additional income into the local economy than hosting the event during the already busy peak period.

In addition, consideration should also be given to future Parade of Sale/Race Days as whilst Sunday 31st August clearly had the biggest attendance numbers it had lower expenditure than the other three days of the event, largely due to attendees moving out of the town to the viewing points along the bay and beaches rather than staying in the centre of the town spending money. Entertainment and food and drink suppliers were not present to the same size and scale as in previous event days and therefore, re-thinking the format of future race days could provide the opportunities to increase the overall revenue of the regatta in the future.

Using the data gathered through this evaluation will help to focus efforts on those areas which are in need of improvement and to help inform the development of future regattas. Particular areas for improvement highlighted by the survey findings include; the availability and cost of car parking and public transport provision during the regatta and the availability of information about visiting Falmouth. Whilst satisfaction with these areas was still relatively high they are the lowest levels recorded of all the indicators tested.

The event clearly has a huge impact on local facilities and infrastructure including parking and public transport provision etc. and consideration should be given as to whether, in fact, the event has reached its full capacity and whether the town could cope with even higher attendee numbers in the future without the need for expensive additions to transport and parking provision etc. It may be that the costs in delivering these could indeed outweigh the potential benefits?

Improving future promotion and communication of the regatta nationwide should also help to attract higher proportions of spectators from outside Cornwall in the future. The profile of spectator origins suggests that there is scope to do this although availability and ease of access needs to be highlighted in any promotional work to achieve this.

Falmouth Tall Ships 2014 Evaluation

Introduction



Introduction

Since the Tall Ships first visited Falmouth in 1966, the port of Falmouth has hosted the Funchal 500 Tall Ships Regatta in 2008, the Cutty Sark Tall Ships Race in 1998 and The Tall Ships Race in 1982. The economic impact of the 2008 event left a lasting impression on the area, attracting over 100,000 visitors and generating £12 million for the local economy.

In 2014, Falmouth once again hosted a Tall Ships Regatta between Thursday 28th August - Sunday 31st August.

Cornwall Development Company (CDC) managed the delivery of the event on behalf of Cornwall Council for the host port of Falmouth, through the regattas and Events Team at Visit Cornwall and were keen to explore the economic impact that the regatta has on Falmouth and Cornwall, in terms of the volume and value of the visits it generates and the effects on local businesses generated by the event with the advertising value equivalent and PR value of the national and international media coverage being evaluated separately.

Visit Cornwall therefore appointed The South West Research Company Ltd. to undertake an economic impact evaluation of the event including an on-site face to face survey with attendees to the regatta over the four day period, a post event on line survey amongst regatta attendees and an online survey amongst local businesses based in Falmouth. The survey was financially supported by Falmouth Business Improvement District (BID).

The overall objective of the study was to provide detailed and statistically robust evidence for the economic impact that the Falmouth Tall Ships Regatta has on Falmouth and other parts of the county, in terms of the volume and value of visits generated and effects on local businesses. The specific objectives of the research are detailed overleaf.

The overall objective of the evaluation research was to provide detailed and statistically robust evidence for the economic impact that the Falmouth Tall Ships Regatta has on Falmouth and Cornwall, in terms of the volume and value of visits generated and effects on local businesses.

In addition the aim of the research was:

- ✓ To estimate the number of visitors to the event
- ✓ To ascertain the impact that the event had on the turnover and operation of food & drink, retail, tourism and other commercial businesses
- ✓ To evaluate the level of visitor satisfaction and value of the event to residents
- ✓ To calculate the additionality effect

Methodology

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

1. Attendee Surveys

A face to face survey amongst a sample of 423 attendees to the Falmouth Tall Ships Regatta was undertaken over the four days of the event.

In addition to the face to face interviews, a total of 2,000 flyers directing attendees to an online questionnaire were distributed. A total of 760 questionnaires were completed online in the month following the regatta.

Both the face to face and online Attendee Surveys explored visitors' demographic profiles, whether the regatta was the main reason for their visit to the town and, in particular, attendee's spending patterns. The post-regatta online survey also explored attendees' views and opinions of the regatta. Full details of the results of the Attendee Surveys can be found in Appendix 1 of this report.

2. Business Survey

In addition to the face to face and on line Attendee Surveys, an online business survey amongst local businesses in Falmouth and Cornwall was also conducted. The questionnaire focused on their trading patterns and the impact of the regatta upon their staffing and turnover. A total of 157 responses were submitted. Full details of the results of the Business Survey can be found in Appendix 2 of this report.

3. Attendee Estimates

Counts were undertaken over the four days of the event to calculate the total estimate of attendees to the regatta.

4. Economic Modelling

Using the data derived from each of the above components, estimates of the overall economic impact of the Falmouth Tall Ships Regatta 2014 on the local and wider economy have been calculated and this data forms the main content of the report to follow.

Falmouth Tall Ships 2014 Evaluation

Attendance Estimates



Attendee Estimates

Attendee counts were undertaken at key entrance sites throughout the four days of the Tall Ships Regatta 2014 including; The Docks, Events Square, Church Street Car Park and Falmouth Bay (Sunday 31st August only).

Visitors to these sites were counted as they entered the entrance points for a minimum of 45 minutes out of every hour between the hours of 11am and 7pm. In addition to this count estimates were made on two of the event evenings and anecdotal evidence gathered from event organisers to support the estimates.

The main basis for the count estimates to follow are based upon visitor numbers to the docks for the period of Thursday to Saturday (28th to 30th August) and through counts conducted covering all access points to the area of Gyllanvase Beach on the Sunday (31st August). Visitor counts for both areas were used as the starting point for attendee estimates which were then supplemented with additional data gathered on visitor numbers and survey data gathered on visitor movement. Visitor counts at the docks provided the most accurate estimate of visitor numbers to a site for the period of Thursday to Saturday as visitors had to pass through a gated entrance and the location of the site meant that multiple visits were unlikely, unlike the rest of the event sites.

Overall, approximately **197,000** people attended the regatta over the four day period. The estimates of total attendees for each day of the regatta are shown in the table below. This figure compares with a police estimate for the four days of 250,000 attendees. However, it is widely acknowledged that historically police estimates tend to over-estimate attendance at such events.

Attendee Estimates	Total estimated attendance
Thursday 28 th August	32,000
Friday 29 th August	33,000
Saturday 30 th August	49,000
Sunday 31 st August	83,000
TOTAL ATTENDEE ESTIMATE	197,000

Attendee Type Estimates

Of the total **197,000** people visiting the regatta over the four day period approximately **92,000** are estimated to be unique visitors to the event.

The unique visitors count below shows the total number of individuals attending over the four day event period by visitor type. Total attendance for the regatta is actually higher than this (see previous page) but some individuals attended on more than one day, hence why the unique day visitors figure is smaller. Survey data which provided details of the days on which respondents had attended the event was used to estimate unique visitors to the event.

Attendee counts by type	All visitors	Average days attended	Unique visitors
A local resident of Falmouth	38,000	2.93	13,000
A resident of Cornwall living elsewhere outside of Falmouth	60,000	1.84	33,000
On holiday staying in Falmouth	44,000	3.02	14,000
On holiday staying elsewhere in Cornwall	50,000	1.77	28,000
On holiday staying outside of Cornwall	2,000	1.33	1,000
Visiting Cornwall for the day	2,000	1.39	1,000
Total	197,000		92,000

*Figures will not sum exactly due to rounding

Falmouth Tall Ships 2014 Evaluation

Economic Evaluation



Economic Impact Estimates

To establish the additional monies brought into the local economy through the regatta, the attendee surveys first asked staying visitors if the Tall Ships Regatta was the main reason for their choosing to visit Cornwall on this occasion. Secondly, all visitors were asked if the regatta was the main reason for their choosing to visit Falmouth on that day. Lastly, respondents were asked if they would have been visiting somewhere else in Falmouth or elsewhere in Cornwall if the regatta were not taking place (including Falmouth residents going out in their place of residence). From these three questions the overall influence of the regatta can be calculated.

Due to the different nature and lower level of expenditure per person at the regatta on Sunday the 31st of August compared to the previous three event days it was necessary to calculate expenditure for these time periods separately. Spend estimates have been calculated by multiplying through the spend per person figures by the visitor estimates as detailed in this chapter. However, the final outputs are constrained to the total spend figures for all visitors as the most robust output from the survey data. In terms of staying visitors, each staying visitor falling into the appropriate spend category has been included as a day visitor for event spend estimates with the appropriate unique visitor staying visitor figure being used to calculate accommodation spend and spend on non-event days. This ensures that staying visitors have their spend included on each day that they attended the event but their accommodation and non-event spend is only included once.

This report looks at visitor expenditure on three levels as shown below;

All associated event spend – This is all spend connected to those attending the event. So spend at the event for all visitor types and spend away from the event for staying visitors for their entire stay (including accommodation costs).

All additional associated event spend – This is all spend connected to those attending the event for whom the Tall ships was the main reason for their staying trip to Cornwall or the main reason for their day visit to Falmouth – these are classed as influenced visitors. This covers all spend at the event for all influenced visitor types and spend away from the event for influenced staying visitors for their entire stay (including accommodation costs).

All truly additional event spend – This is as above but also takes into account displacement and deadweight (what would have happened anyway). So whilst residents of Falmouth and Cornwall, or staying visitors whose entire visit wasn't motivated by the Tall Ships were at the event a proportion of them would have been out in Falmouth or Cornwall spending anyway if the event had not been on. This figure is the one that can be classed as the amount of new money brought into Falmouth/Cornwall by the presence of the Tall Ships.

***Please also note that figures will not always sum exactly due to rounding.**

Economic Impact Estimates

Further economic outputs contained within this chapter for business turnover and employment supported by visitor spend have been calculated using multipliers from the Cambridge Model.

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 Carrick data in the Value of Tourism report (for further details of the Cambridge Model see Appendix 3).

Further economic outputs contained within this chapter for business turnover and employment supported by visitor spend refer to the following terms which are explained below;

Total business turnover	Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.
Direct employment	Employment arising as a direct result of visitor expenditure
Indirect employment	Employment arising from the purchase of supplies and services by those in receipt of direct visitor expenditure
Induced Employment	Income induced employment arises from expenditure by employees whose jobs are supported by tourism spend
FTE's	Full time equivalent jobs

Economic Impact Estimates

All associated event spend

The spend figures contained within this section relate to the total number of attendees at the Falmouth Tall Ships regatta during their visit to Falmouth/Cornwall, whether influenced to visit by the regatta or not. This is all spend connected to those attending the event. So spend at the event for all visitor types and spend away from the event for staying visitors for their entire stay (including accommodation costs).

ALL ASSOCIATED EVENT SPEND WAS ESTIMATED AT £20.9 MILLION

ALL ASSOCIATED EVENT SPEND BREAKDOWN	Food and drink	Shopping	Entertainment	Transport	Total
Event spend	£3,063,000	£1,448,000	£571,000	£1,158,000	£6,239,000
Staying visitor non-event days spend Falmouth	£663,000	£434,000	£328,000	£473,000	£1,897,000
Staying visitor non-event days spend Cornwall	£1,649,000	£1,080,000	£814,000	£1,175,000	£4,719,000
Total	£5,375,000	£2,961,000	£1,712,000	£2,807,000	£12,856,000
Falmouth staying visitor accommodation spend					£3,418,000
Cornwall staying visitor accommodation spend					£4,607,000
Total					£20,881,000

Economic Impact Estimates

All additional associated event spend

The spend figures contained within this section relate to the total number of attendees that were influenced to visit both Falmouth and Cornwall by the presence of the Tall Ships Regatta. This is all spend connected to those attending the event for whom the Tall ships was the main reason for their staying trip to Cornwall or the main reason for their day visit to Falmouth – these are classed as influenced visitors. This covers all spend at the event for all influenced visitor types and spend away from the event for influenced staying visitors for their entire stay (including accommodation costs).

ALL ADDITIONAL ASSOCIATED EVENT SPEND WAS ESTIMATED AT £12.8 MILLION

ALL ADDITIONAL ASSOCIATED EVENT SPEND BREAKDOWN	Food and drink	Shopping	Entertainment	Transport	Total
Event spend	£1,986,000	£935,000	£364,000	£765,000	£4,051,000
Staying visitor non-event days spend Falmouth	£517,000	£339,000	£256,000	£368,000	£1,479,000
Staying visitor non-event days spend Cornwall	£841,000	£550,000	£415,000	£599,000	£2,406,000
Total	£3,344,000	£1,825,000	£1,035,000	£1,734,000	£7,938,000
Falmouth staying visitor accommodation spend					£2,564,000
Cornwall staying visitor accommodation spend					£2,260,000
Total					£12,762,000

Economic Impact Estimates

All truly additional associated event spend

The spend figures contained within this section relate to the total number of attendees that were influenced to visit both Falmouth and Cornwall by the presence of the Tall Ships Regatta but also takes into account displacement and deadweight (what would have happened anyway). So whilst residents of Falmouth and Cornwall, or staying visitors whose entire visit wasn't motivated by the Tall Ships were at the event a proportion of them would have been out in Falmouth or Cornwall spending anyway if the event had not been on. This figure is the one that can be classed as the amount of new money brought into Falmouth/Cornwall by the presence of the Tall Ships.

ALL TRULY ADDITIONAL ASSOCIATED EVENT SPEND WAS ESTIMATED AT £10.5 MILLION

ALL TRULY ADDITIONAL ASSOCIATED EVENT SPEND BREAKDOWN	Food and drink	Shopping	Entertainment	Transport	Total
Event spend	£900,000	£425,000	£168,000	£340,000	£1,833,000
Staying visitor non-event days spend Falmouth	£517,000	£339,000	£256,000	£368,000	£1,479,000
Staying visitor non-event days spend Cornwall	£841,000	£550,000	£415,000	£599,000	£2,406,000
Total	£2,258,000	£1,314,000	£838,000	£1,308,000	£5,718,000
Falmouth staying visitor accommodation spend					£2,564,000
Cornwall staying visitor accommodation spend					£2,260,000
Total					£10,542,000

Economic Impact Estimates

Event related/support workers spend

In addition to the visitor spend categories previously detailed an estimate has been made for the total spend related to those people who were in Falmouth working as part of the event. This would include roles such as additional police/emergency services, event traders, volunteers and event organisers who accounted for an estimated 800 people (assumed 50% staying overnight and 50% travelling to and from home). Event related/support workers spend has not been included in the previous categories as the whilst the count estimates are informed the spend estimates are largely based upon assumptions, but they have been included in the business turnover and employment estimates to follow. Spend per person per day has been calculated for this group using Cornwall 2013 volume and value data.

EVENT RELATED/SUPPORT WORKERS SPEND WAS ESTIMATED AT £217,000

ALL ASSOCIATED EVENT SPEND BREAKDOWN	Accommodation	Food and drink	Shopping	Entertainment	Transport	Total
Staying overnight	£61,000	£24,000	£36,000	£18,000	£26,000	£163,000
Travelling to and from home	£0	£16,000	£23,000	£6,000	£9,000	£54,000
Total	£61,000	£39,000	£59,000	£24,000	£34,000	£217,000

Economic Impact Estimates – Turnover and Employment

LOCAL BUSINESS TURNOVER SUPPORTED BY VISITOR SPENDING

	ALL ASSOCIATED EVENT SPEND	ALL ADDITIONAL ASSOCIATED EVENT SPEND	ALL TRULY ADDITIONAL ASSOCIATED EVENT SPEND
Direct	£19,962,000	£12,271,000	£10,221,000
Supplier & income induced	£9,234,000	£5,648,000	£4,937,000
Total	£29,196,000	£17,919,000	£15,158,000

EMPLOYMENT SUPPORTED BY VISITOR SPENDING

Full time equivalent	ALL ASSOCIATED EVENT SPEND	ALL ADDITIONAL ASSOCIATED EVENT SPEND	ALL TRULY ADDITIONAL ASSOCIATED EVENT SPEND
Direct	307	188	160
Indirect	96	59	52
Induced	50	31	26
Total	453	278	238

Estimated actual	ALL ASSOCIATED EVENT SPEND	ALL ADDITIONAL ASSOCIATED EVENT SPEND	ALL TRULY ADDITIONAL ASSOCIATED EVENT SPEND
Direct	453	278	236
Indirect	110	67	59
Induced	57	35	30
Total	620	380	325

Economic Impact Estimates – Basis for Calculations

Attendee counts by type – ALL ASSOCIATED EVENT SPEND	Day visitors	Thurs-Sat	Sunday	Unique staying visitors
A local resident of Falmouth	38,000	19,000	20,000	
A resident of Cornwall living elsewhere outside of Falmouth	60,000	31,000	29,000	
On holiday staying in Falmouth	44,000	23,000	21,000	14,000
On holiday staying elsewhere in Cornwall	50,000	38,000	13,000	28,000
On holiday staying outside of Cornwall	2,000	2,300	0	
Visiting Cornwall for the day	2,000	2,000	0	
Total	197,000	114,000	83,000	42,000

Attendee counts by type – ALL ADDITIONAL ASSOCIATED EVENT SPEND	Influenced day visitors	Thurs-Sat	Sunday	Influenced unique staying visitors
A local resident of Falmouth	21,000	10,000	11,000	
A resident of Cornwall living elsewhere outside of Falmouth	54,000	28,000	26,000	
On holiday staying in Falmouth	32,000	17,000	15,000	11,000
On holiday staying elsewhere in Cornwall	40,000	30,000	11,000	14,000
On holiday staying outside of Cornwall	2,000	2,000	0	
Visiting Cornwall for the day	2,000	2,000	0	
Total	150,000	88,000	62,000	25,000

Economic Impact Estimates – Basis for Calculations

Attendee counts by type – ALL TRULY ADDITIONAL ASSOCIATED EVENT SPEND	Truly influenced day visitors	Thurs-Sat	Sunday	Truly influenced unique staying visitors
A local resident of Falmouth	9,000	4,000	4,000	
A resident of Cornwall living elsewhere outside of Falmouth	24,000	13,000	12,000	
On holiday staying in Falmouth	10,000	5,000	5,000	11,000
On holiday staying elsewhere in Cornwall	13,000	9,000	3,000	14,000
On holiday staying outside of Cornwall	1,000	1,000	0	
Visiting Cornwall for the day	1,000	1,000	0	
Total	58,000	34,000	24,000	25,000

Economic Impact Estimates – Basis for Calculations

SUMMARY OF AVERAGE SPEND PER PERSON BY TYPE

Attendee type	ALL ASSOCIATED EVENT SPEND		ALL ADDITIONAL ASSOCIATED EVENT SPEND		ALL TRULY ADDITIONAL ASSOCIATED EVENT SPEND	
	28 th –30 th Aug	31 st Aug	28 th –30 th Aug	31 st Aug	28 th –30 th Aug	31 st Aug
A local resident of Falmouth	£32.71	£5.35	£27.59	£4.97	£35.39	£5.75
A resident of Cornwall living elsewhere outside of Falmouth	£25.47	£15.88	£21.32	£13.73	£27.46	£14.68
On holiday staying in Falmouth	£80.41	£25.94	£67.49	£23.77	£86.88	£27.30
On holiday staying elsewhere in Cornwall	£42.84	£11.40	£35.83	£10.35	£46.13	£11.69
On holiday staying outside of Cornwall	£33.12	£0.00	£27.91	£0.00	£35.88	£0.00
Visiting Cornwall for the day	£33.04	£0.00	£27.75	£0.00	£35.61	£0.00
ALL VISITORS	£43.62	£15.15	£43.62	£15.15	£43.62	£15.15

Economic Impact Estimates

Staying visitor non-event spend

The average length of stay for staying visitors to Falmouth (6.6 nights) or elsewhere in Cornwall (7.6 nights) was longer than the actual regatta (4 nights). As a result it was necessary to calculate expenditure for staying visitors for non-event days spent in Cornwall to provide the full economic value of the event. Accommodation expenditure was already available through the survey data collected and spend per person for each of the remaining categories was estimated based upon Cornwall 2013 volume and value data.

STAYING VISITOR NON-EVENT SPEND	Food and drink	Shopping	Entertainment	Transport	Total (excluding accommodation)
All staying visitors	£12.36	£8.09	£6.10	£8.81	£35.36

Economic Impact Estimates

Return on investment

Using the economic impact estimates calculated and details of the costs associated with holding the Tall Ships regatta it is possible to calculate the return on investment for the event. To do this, the all truly additional associated spend figure of £10.5 million has been used which when divided by the total investment in the regatta (£407,189) provides the return per pound invested.

The regatta overall returned a healthy £25.89 of additional money into the Cornwall economy for every pound invested which would not have occurred without the presence of the event. Whilst the individual parties return is obviously the same for each pound invested the table also shows the amount of the £10.5 million which is attributed to each partners investment. Whilst this provides the financial returns achieved, the contributions of those organising and co-ordinating the event, without whom the income would not have occurred, are not necessarily captured through this measure and should not be overlooked.

Return on investment	Investment	Return per pound invested	Value of additional spend attributed
Official partners income	£140,000		£3,624,558
Official partners in kind support	£103,450		£2,678,289
Sponsorship income	£54,000		£1,398,044
Sponsorship in kind support	£10,000		£258,897
Partners and supporters income	£19,969		£516,991
Partners and supporters in kind support	£29,825		£772,160
Other income	£44,770		£1,159,082
Other in-kind support	£5,175		£133,979
Total	£407,189	£25.89	£10,542,000
Cornwall Council contribution	£100,000		£2,588,970
Public sector contribution	£120,000		£3,106,764

Falmouth Tall Ships 2014 Evaluation



Appendix 1 – Attendee Surveys Results



Attendee Surveys

Attendee data was captured using two methods;

Face to Face survey

423 on site interviews amongst attendees to the Falmouth Tall Ships Regatta over the four days of the event.

Online survey

760 responses were received post-regatta from those who were handed a flyer during the four days of the event.

The surveys covered a range of issues including their area of origin, age profile, trip details, information sourcing, satisfaction levels with their visit to Falmouth, satisfaction levels with the regatta (online survey only), awareness of BT Cornwall as the main event sponsor and also profiled their expenditure patterns. In addition, questions were included around activity participation (online attendee survey only).

However, not all questions were suitable for all survey methods so the bases may differ in some instances. That said, the sample captured provides a very robust evidence base to help guide the future of the regatta.

The highlights of the combined surveys results are detailed on the slides to follow.

Attendee Surveys

Origin of respondents (all attendee survey respondents)

54% of all attendees (who provided their postcode details) were Cornish residents. A further 12% lived in the neighbouring county of Devon, including 6% in Plymouth, 4% Exeter and 2% in Torquay. 8% of regatta attendees lived elsewhere in the South West region (including 2% in Taunton) whilst 25% lived elsewhere in the UK (including 1% in each case in Birmingham, Colchester, Coventry, Derby, Dudley, Guildford, Hemel Hempstead, Leicester, Northampton, Nottingham, Oxford, Peterborough, Reading, Shrewsbury, Stoke-on-Trent and Worcester). 1% of all attendees to the regatta were from overseas countries including France, Germany, the USA and China.

Postal area	
Truro/Cornwall	54%
Plymouth	6%
Exeter	4%
Torquay	2%
Taunton	2%
Other SW postal area	6%
Other UK postal area	25%
Overseas	1%
TOTAL	100%



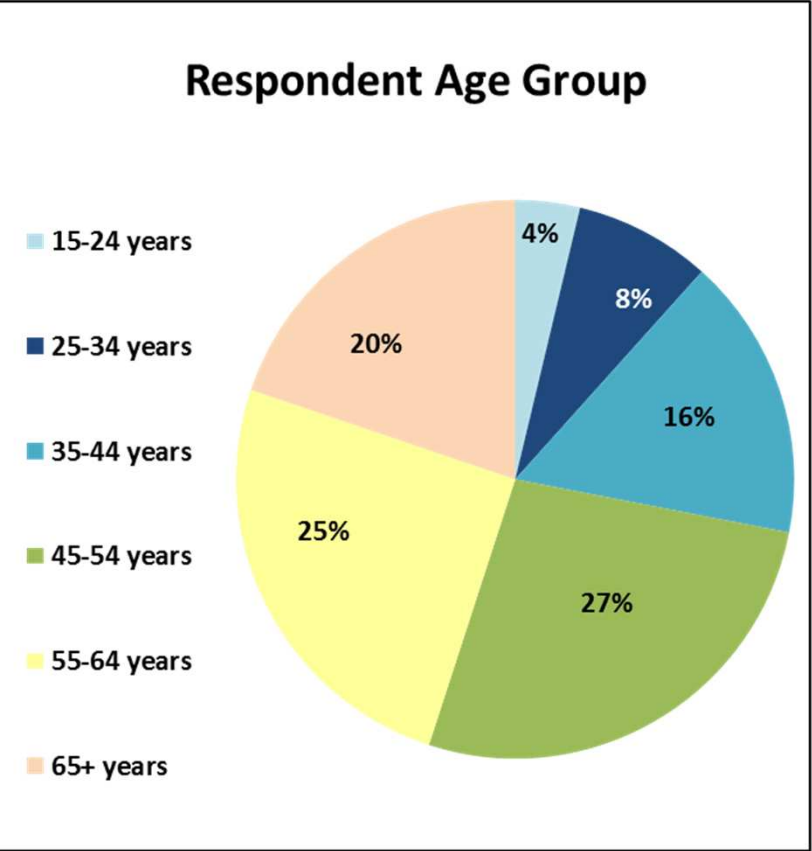
Attendee Surveys

Age profile and gender of respondents (all attendee survey respondents)

65% of survey respondents were female and 35% were male.

The majority of survey respondents were aged 45+ years (72%) including 27% aged 45-54 years, 25% aged 55-64 years and 20% aged 65+ years.

A breakdown of survey respondents age group by visitor type is also shown in the table below.



Visitor type	Respondent age group (years)					
	15-24	25-34	35-44	45-54	55-64	65+
A local resident of Falmouth	6%	15%	21%	23%	20%	15%
A resident of Cornwall living elsewhere outside of Falmouth	4%	7%	16%	29%	24%	20%
On holiday staying in Falmouth	2%	3%	10%	23%	37%	24%
On holiday staying elsewhere in Cornwall	2%	4%	20%	34%	21%	19%
On holiday staying outside of Cornwall	0%	0%	0%	33%	0%	67%
Visiting Cornwall for the day	0%	4%	0%	38%	25%	33%

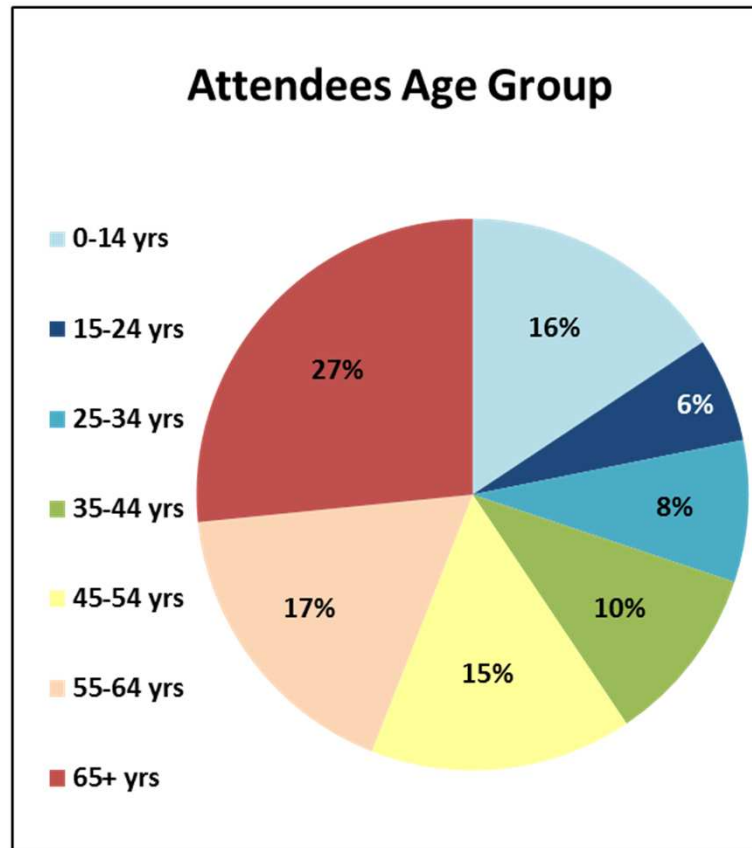
Attendee Surveys

Age profile and gender of all attendees (face to face survey respondents only)

51% of all regatta attendees were female and 49% were male.

The majority of regatta attendees were aged 45+ years (59%) including 15% aged 45-54 years, 17% aged 55-64 years and 27% aged 65+ years. 16% were children aged 0-14 years.

A breakdown of the age group of regatta attendees by visitor type is also shown in the table below.



Visitor type	Age group (years)						
	0-14	15-24	25-34	35-44	45-54	55-64	65+
A local resident of Falmouth	14%	10%	9%	7%	16%	20%	24%
A resident of Cornwall living elsewhere outside of Falmouth	17%	4%	12%	12%	15%	17%	22%
On holiday staying in Falmouth	14%	5%	7%	8%	11%	20%	35%
On holiday staying elsewhere in Cornwall	17%	7%	5%	13%	18%	16%	24%
On holiday staying outside of Cornwall	8%	0%	0%	0%	15%	0%	77%
Visiting Cornwall for the day	6%	0%	17%	11%	22%	0%	44%

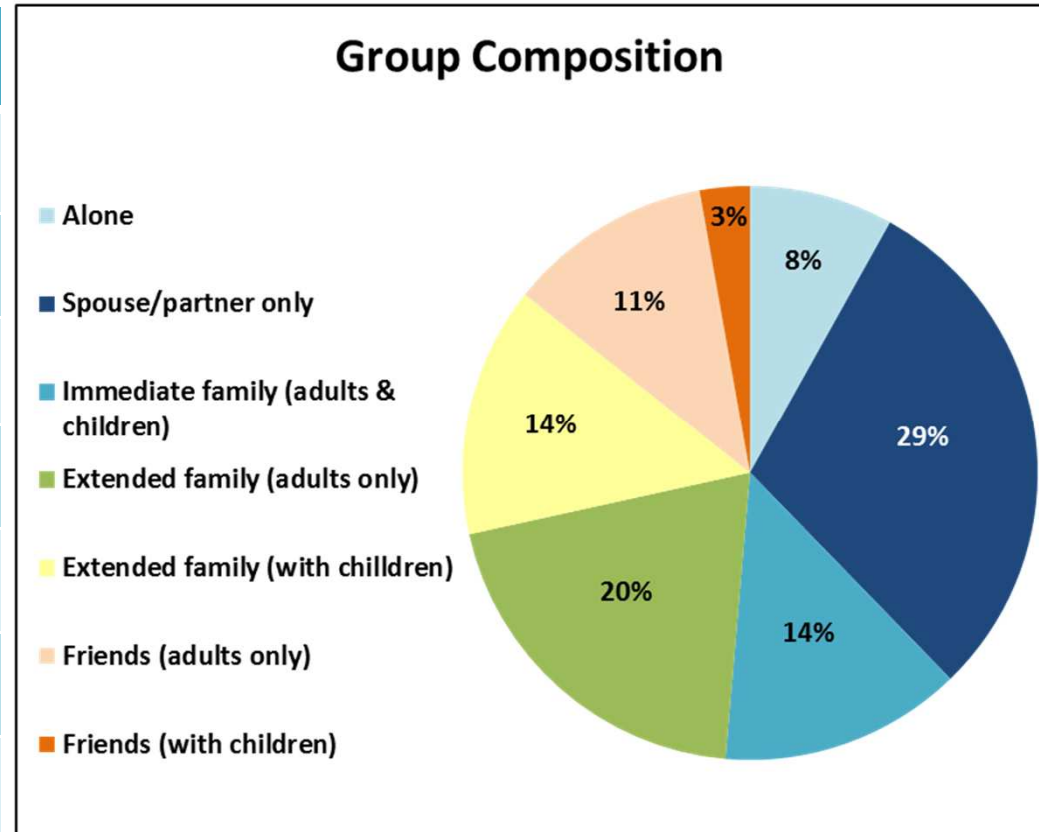
Attendee Surveys

Group composition & average group size (all attendee survey respondents)

68% of regatta attendees visited in adult only groups including 29% with their spouse/partner, 20% in an extended family group, 11% with friends and 8% alone. The remaining 31% of attendees visited the regatta with children including 14% in each case in an immediate or extended family group and 3% with friends.

The average total group size was 3.09 people.

Visitor type	Ave. children	Ave. adults	Ave. total group size
All attendees	0.48	2.61	3.09
A local resident of Falmouth	0.45	2.72	3.17
A resident of Cornwall living elsewhere outside of Falmouth	0.52	2.53	3.05
On holiday staying in Falmouth	0.42	2.52	2.94
On holiday staying elsewhere in Cornwall	0.55	2.69	3.24
On holiday staying outside of Cornwall	0.20	2.40	2.60
Visiting Cornwall for the day	0.14	2.43	2.57

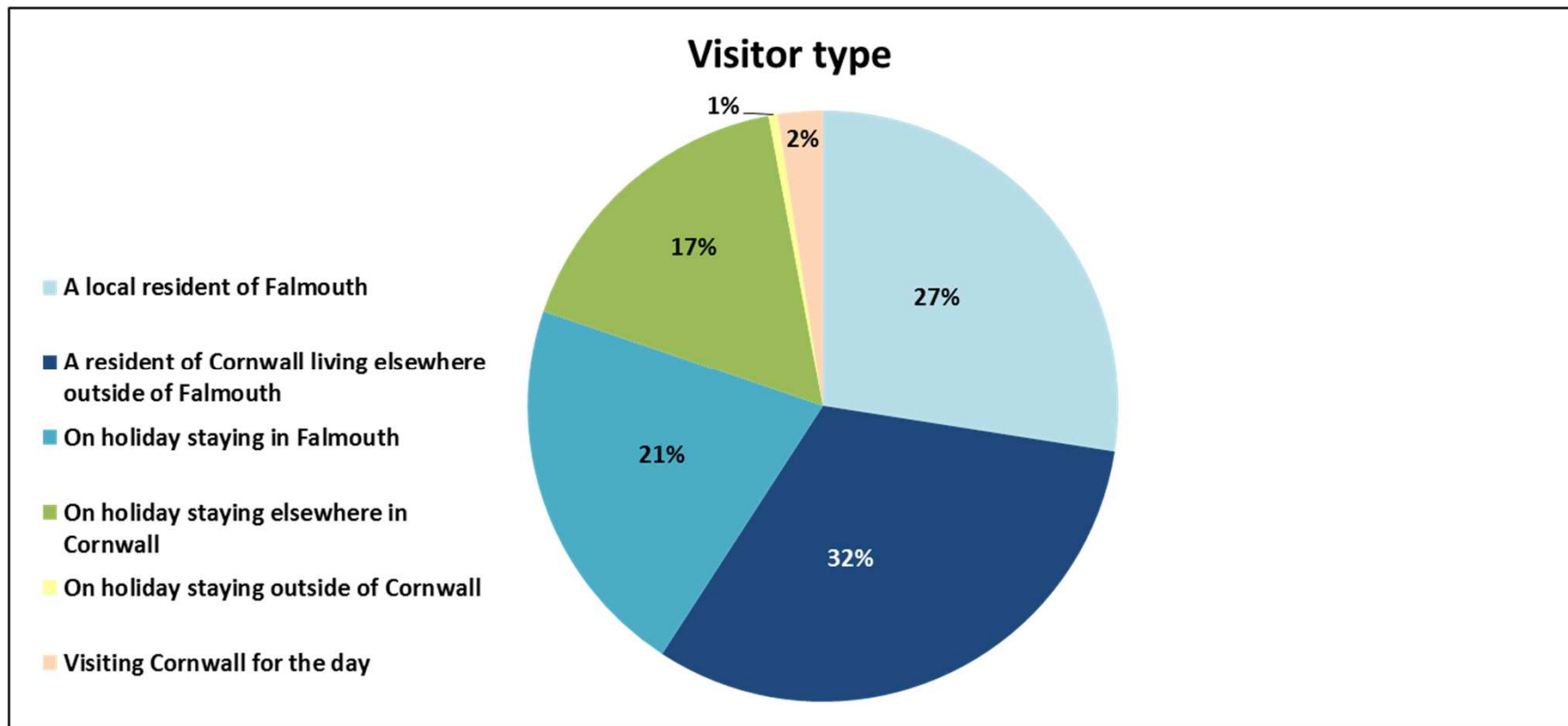


Attendee Surveys

Type of trip (all attendee survey respondents)

Over half (59%) of attendees to the regatta were residents of Cornwall including 27% who lived in Falmouth and 32% who lived elsewhere in the county.

Approximately one fifth of attendees (21%) were on holiday staying overnight in Falmouth, whilst a further 17% were staying overnight elsewhere in Cornwall. Just 3% of attendees were visiting the county for the day either from a nearby holiday base outside of the county (1%) or to and from their own homes on the day of their visit (2%).



Attendee Surveys

Accommodation used – visitors on holiday staying overnight in Falmouth/Cornwall only (all staying visitor attendee survey respondents)

34% of attendees staying overnight in Falmouth/Cornwall were doing so in serviced accommodation including 20% in a hotel, 13% in a B&B/guesthouse/farmhouse and 1% in a pub. 21% in each case were staying in self-catering accommodation or at the home of a friend/relative. A further 14% of attendees staying overnight in Falmouth/Cornwall were staying on a camping/touring site.

To see the list of the other types of accommodation attendees were staying in please refer to the appendix which accompanies this report.

Accommodation used	
Hotel	20%
B&B/Guest house/Farmhouse	13%
Self catering accommodation	21%
Camping/touring site	14%
Holiday park	2%
Pub	1%
Boat	4%
Second home/timeshare	3%
Staying with friends or relatives	21%
Other	2%

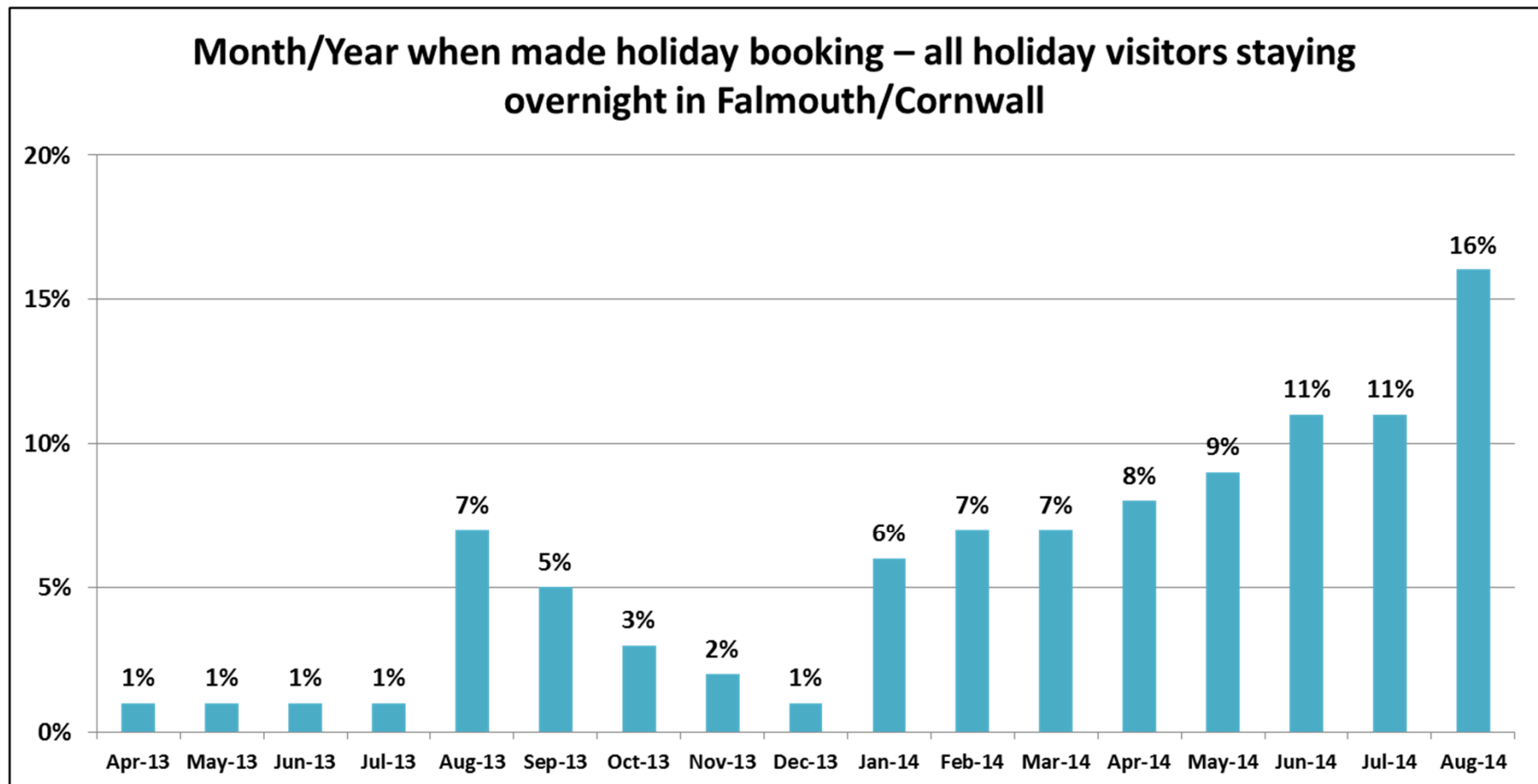
The average duration of stay for those attendees staying overnight in Falmouth was 6.6 nights compared with 7.6 night for those staying elsewhere in Cornwall. This resulted in an overall average length of stay for all staying visitors of 7.15 nights.

The average spend per person per night on accommodation in Falmouth was £34.64 compared with £20.62 for those staying elsewhere in Cornwall. This resulted in an overall average spend per person per night on accommodation amongst all staying visitors of £26.18.

Attendee Surveys

Month & year when made holiday booking - visitors on holiday staying overnight in Falmouth/Cornwall only (all staying visitor attendee survey respondents)

The majority of regatta attendees staying overnight in Falmouth/Cornwall (79%) had made their holiday booking during the year of the regatta including 16% during the actual month of regatta (August 2014) and a further 22% during June or July 2014 (11% in each case).

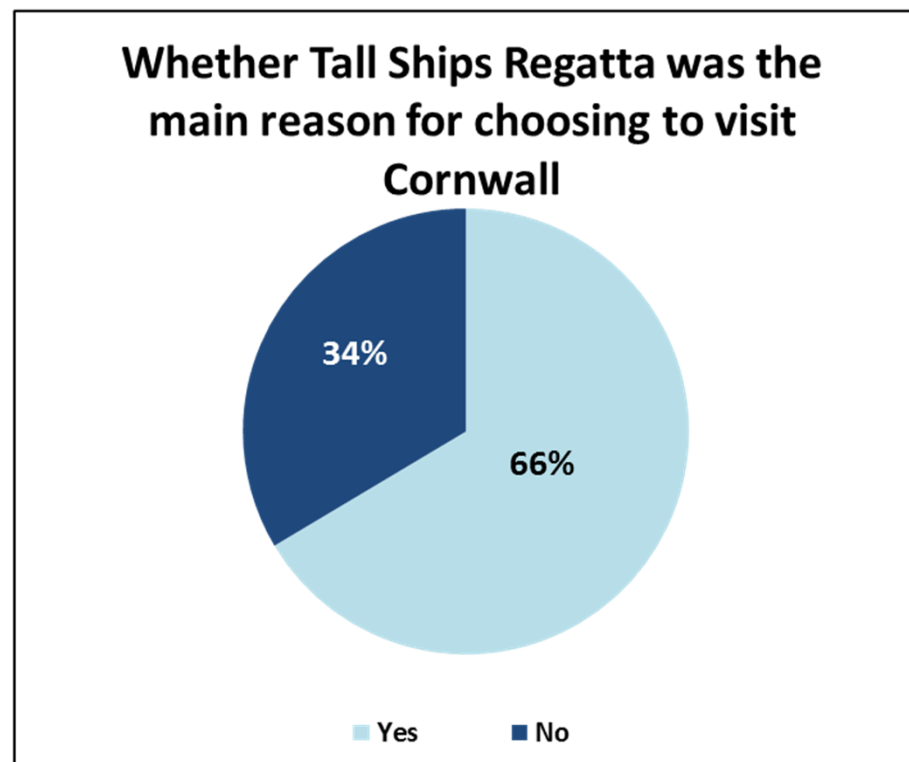


Attendee Surveys

Whether the Tall Ships Regatta 2014 was the MAIN reason for choosing to visit Cornwall - visitors on holiday staying overnight in Falmouth/Cornwall only (all staying visitor attendee survey respondents)

Two thirds of all those attendees on holiday staying overnight in Falmouth/elsewhere in Cornwall indicated that the Tall Ships Regatta was the main reason for them choosing to visit Cornwall on this particular occasion.

A full explanation of how levels of influence were applied to establish influenced visitor totals is provided in the Economic Evaluation section towards the front of this report.



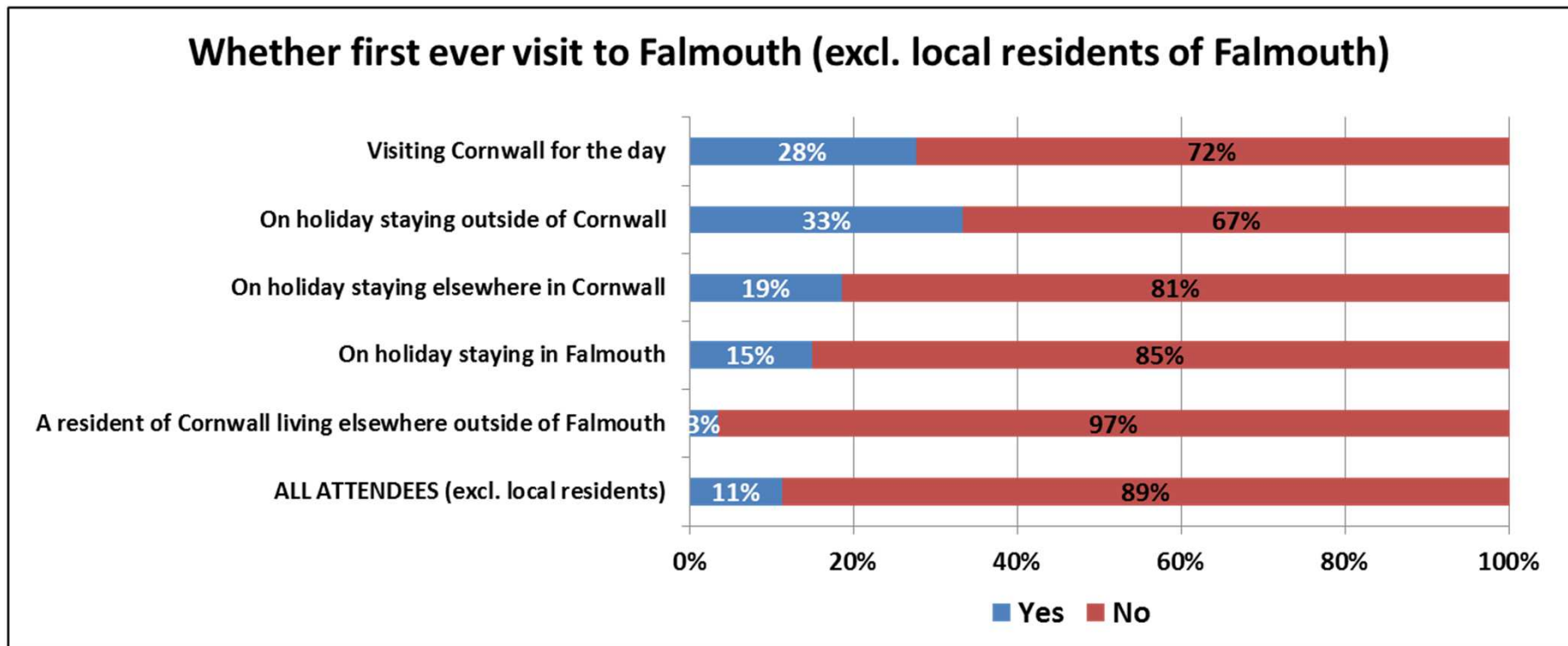
Attendee Surveys

Whether first ever visit to Falmouth (all attendee survey respondents excluding local residents of Falmouth)

Only 11% of attendees indicated that 2014 was the first time that they had visited Falmouth with this proportion highest amongst those attendees on holiday staying outside of Cornwall (33%) and lowest amongst residents of Cornwall living outside of Falmouth (3%).

The majority of previous visitors to Falmouth had visited the town on 5 or more previous occasions (77%), 12% three to five times, 7% twice before and just 5% on only one previous occasion.

65% of previous visitors to Falmouth had last visited the town earlier in 2014 and 16% during 2013. The remaining 20% of previous visitors had last visited the town during 2012 or earlier (including 11% during 2009 or earlier).

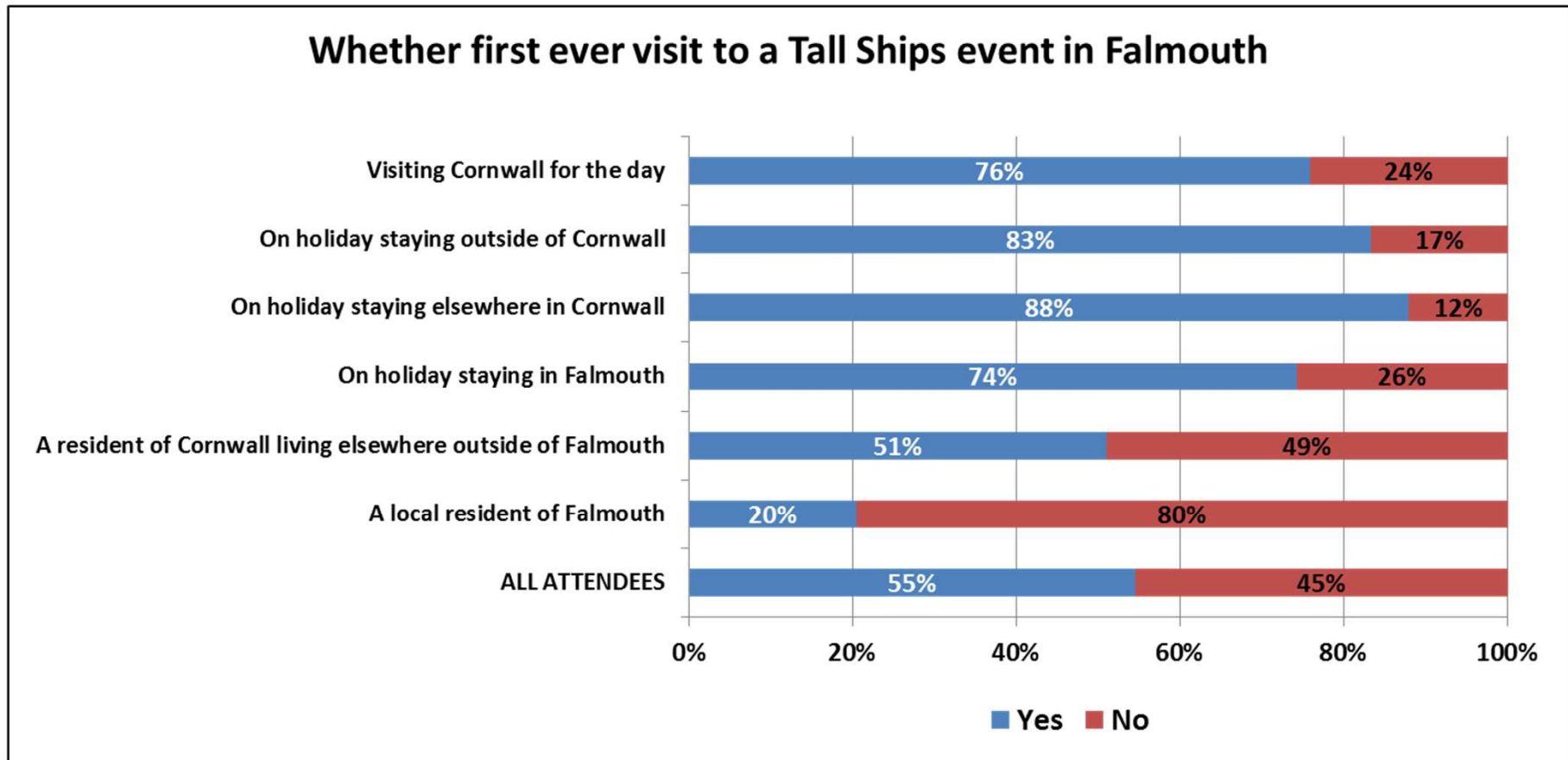


Attendee Surveys

Whether first ever visit to a Tall Ships event in Falmouth (all attendee survey respondents)

55% of attendees indicated that this was the first time that they had attended a Tall Ships event in Falmouth with this proportion highest amongst those attendees on holiday staying elsewhere in Cornwall (88%) and lowest amongst local residents of Falmouth (20%).

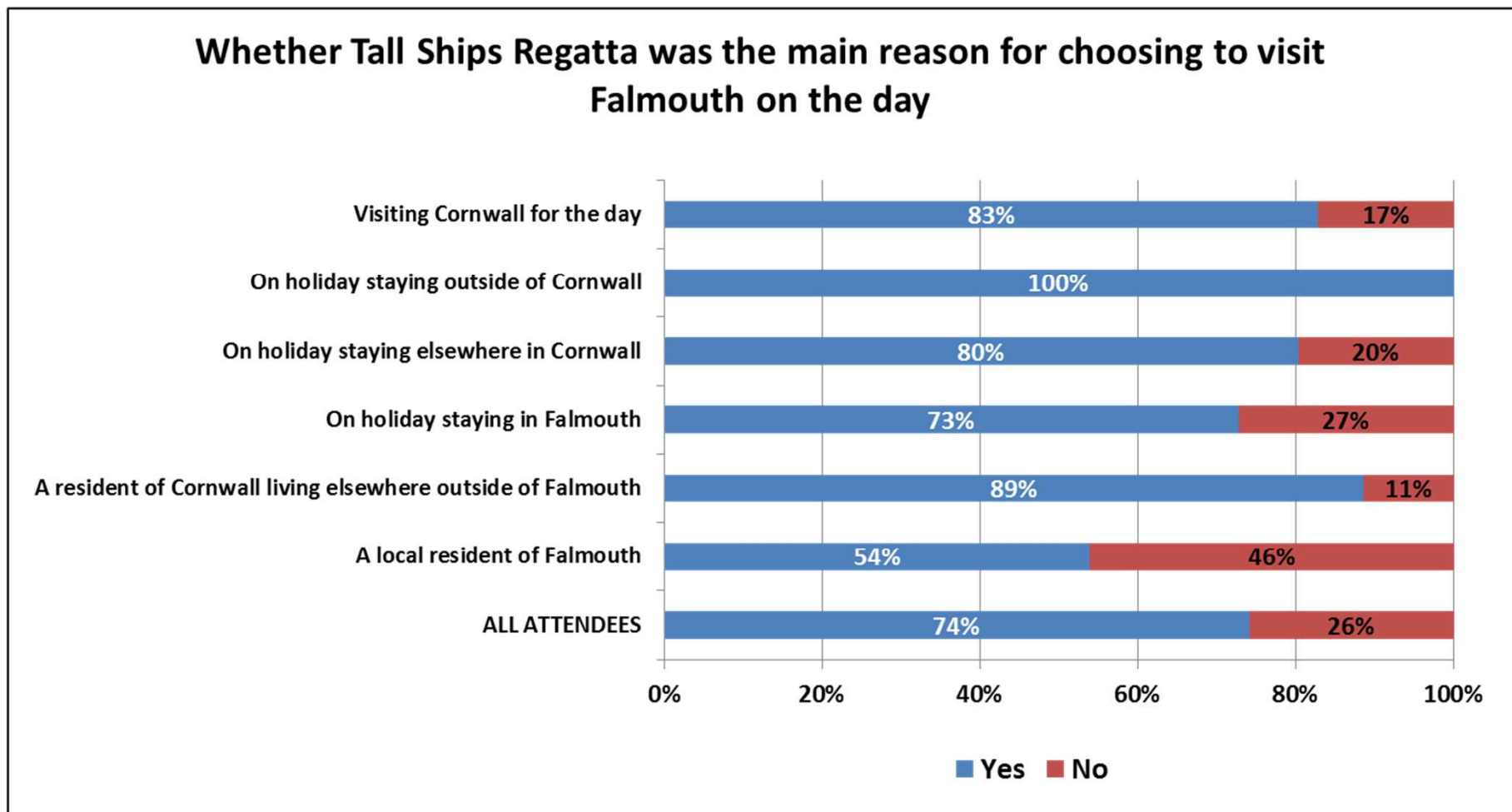
82% of attendees who had visited a Tall Ships event in Falmouth previously had attended the 2008 regatta when it was last hosted in the town (including 91% of local residents and 80% of Cornish residents), 54% during 1998, 24% during 1982 and 8% during 1966.



Attendee Surveys

Whether the Tall Ships Regatta was the MAIN reason for choosing to visit Falmouth on the day (all attendee survey respondents)

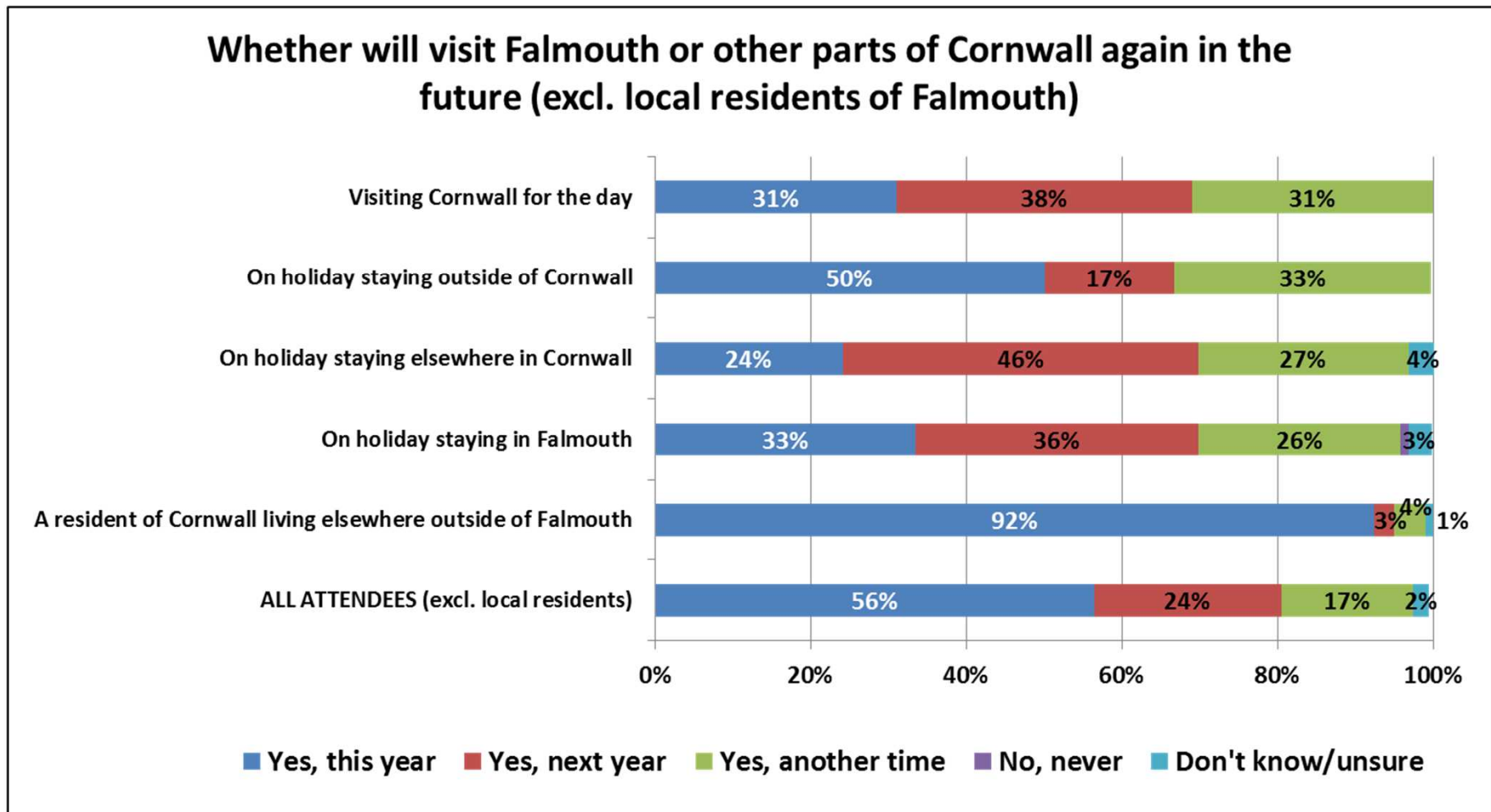
74% of all attendees indicated that the Tall Ships Regatta was the main reason for them choosing to visit Falmouth on the day they were interviewed/attended an event. This proportion remained at a minimum of 54% or more of respondents for each visitor type.



Attendee Surveys

Whether will visit Falmouth or other parts of Cornwall again in the future (all attendee survey respondents excluding local residents of Falmouth)

97% of all attendees (excluding local residents of Falmouth) indicated that they will visit Falmouth or other parts of Cornwall again in the future. This proportion remained at a minimum of 95% or more of respondents for each visitor type.

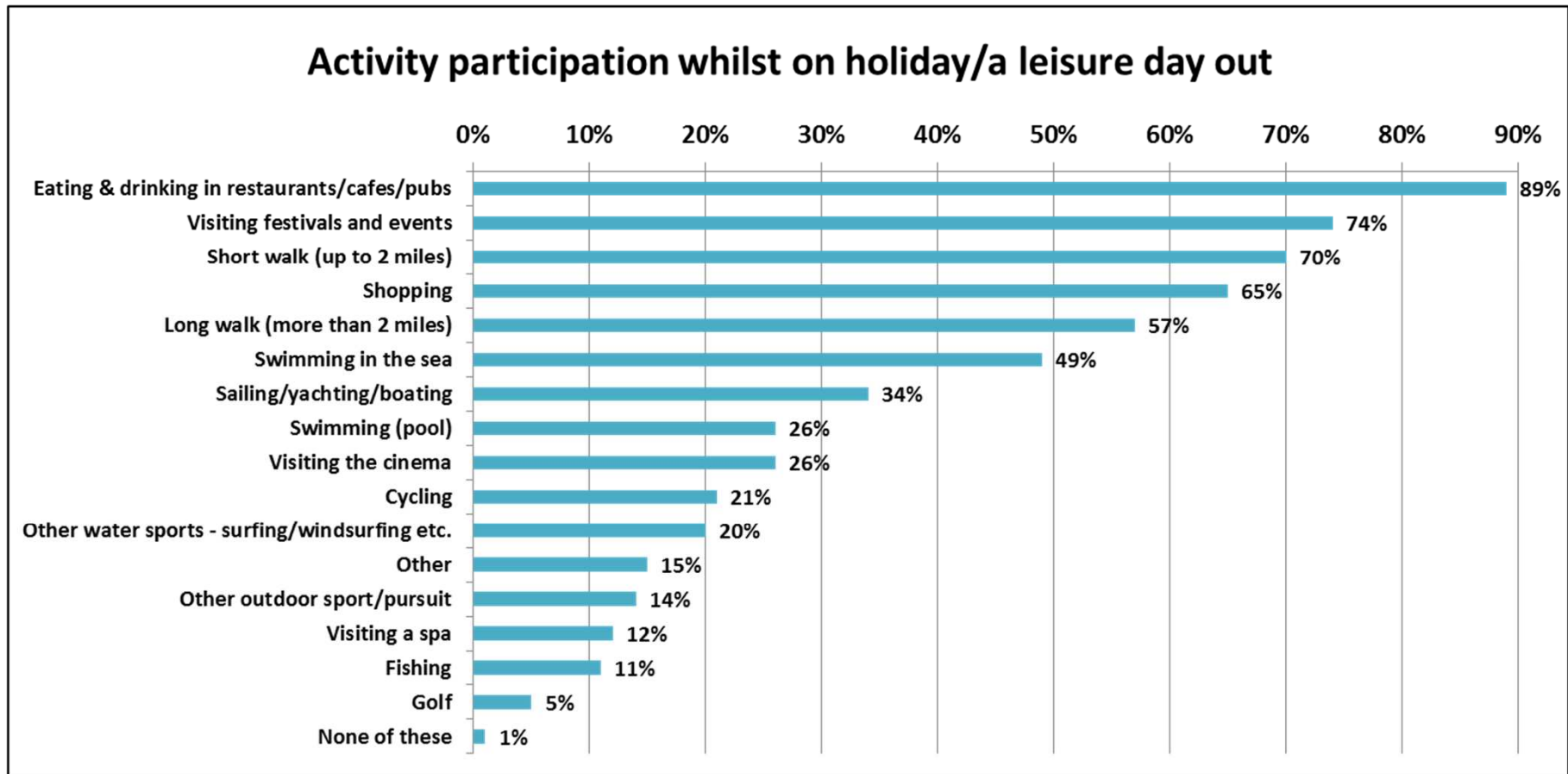


Attendee Surveys

Activity participation (online attendee survey respondents only)

Online regatta attendees only were asked about the types of activities they like to participate in whilst they are on holiday and/or a leisure day out.

The top activities participated in were eating & drinking (89%), visiting festivals and events (74%), going for a short walk (70%), going shopping (65%), going for a long walk (57%) and swimming in the sea (49%).



Attendee Surveys

Where sourced information about visiting Falmouth/the Tall Ships Regatta (all attendee survey respondents)

Where sourced information about visiting....	Falmouth	Tall Ships Regatta
www.falmouthtallships.co.uk website	44%	53%
Recommendation/word of mouth	26%	31%
I did not source any information	25%	6%
Social media website e.g. Facebook/Twitter	24%	26%
Newspaper	17%	22%
www.falmouth.co.uk website	14%	14%
Leaflet/programme	12%	17%
www.visitcornwall.com website	12%	8%
Radio	8%	9%
Other internet site	7%	4%
Other	6%	5%
Television	4%	7%
Magazine	3%	3%
At another event/show	1%	1%
By chance	1%	2%

Regardless of whether the information was about visiting Falmouth or the Tall Ships Regatta, the most popular forms of information used amongst attendees was very similar.

The largest proportions of attendees (44% for information about visiting Falmouth and 53% for information about visiting the Tall Ships Regatta) had sourced information on the www.falmouthtallships.co.uk website. A further 26% of attendees had sourced information about visiting Falmouth via a recommendation/word of mouth compared with 31% of attendees when sourcing information about visiting the Tall Ships Regatta.

24% of attendees had sourced information about visiting Falmouth via a social media website such as Facebook or Twitter compared with 26% when sourcing information about visiting the Tall Ships event.

25% of attendees had not sourced any information about visiting Falmouth compared with only 6% of attendees with regards to visiting the Tall Ships Regatta.

Attendee Surveys

Use of the internet (online attendee survey respondents only)

78% of internet users had used it to source information only, 15% to source information and to book their accommodation and 7% to source information and to book car hire/flights/attraction tickets etc.

What did you use the internet for?	
Information sourcing ONLY	78%
Information sourcing AND to book accommodation	15%
Information sourcing AND to book car hire/flights/attraction tickets etc.	7%
Which internet sites did you use to book your accommodation/car hire/attraction tickets etc.?	
www.visitcornwall.com	11%
www.falmouth.co.uk	8%
www.falriver.co.uk	-
Accommodation providers website	39%
www.Laterooms.com etc.	19%
I did not use the internet to book my accommodation	4%
Other	35%

39% of internet users who used it to book their accommodation, car hire etc. had used their accommodation providers website to do so. A further 19% had used websites such as www.Laterooms.com etc. whilst 11% had used the www.visitcornwall.com website and 8% the www.falmouth.co.uk website.

Attendee Surveys

Use of the internet (online attendee survey respondents only)

Which internet sites do you use WHEN YOU ARE DECIDING which holiday destinations to visit?	
www.visitcornwall.com	28%
www.falmouth.co.uk	16%
www.falriver.co.uk	9%
Travel magazine websites: e.g. Lonely Planet, Sunday Times Travel, Conde Nast Traveller	11%
Large portals e.g. MSN, Yahoo	5%
Search engines	63%
Other	20%

When asked which internet sites they use when deciding which holiday destinations to visit 63% of internet users had used an internet search engine.

28% had used the www.visitcornwall.com website and a further 16% the www.falmouth.co.uk and 9% the www.falriver.co.uk website.

11% of internet users had used a travel magazine website.

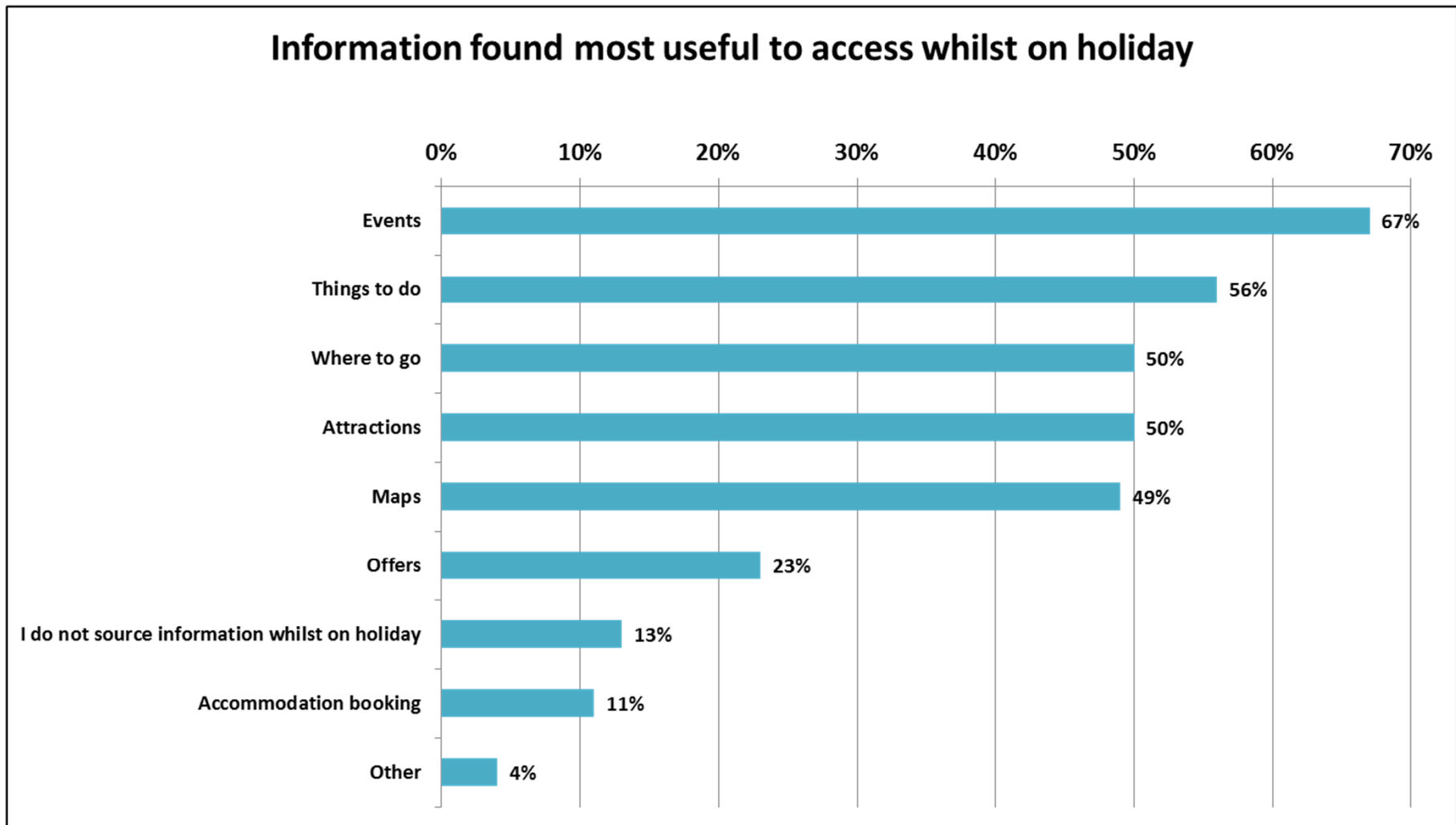
Which internet sites do you use to find out local information WHILE YOU ARE ON HOLIDAY?	
Twitter	17%
Facebook	47%
Email	23%
Text messages	16%
TIC website	8%
Tourist board website	30%
None of the above	23%
Other	10%

When asked which internet sites they use to find out local information while they are on holiday 47% of internet users indicated that they had used Facebook, 30% a tourist board website and 23% had used email.

Attendee Surveys

Information access during holiday (online attendee survey respondents only)

When asked which information they find most useful to access whilst on holiday 67% said 'Events' information, 56% 'Things to do' information, 50% in each case said 'Where to go' and 'Attractions' information and a further 49% said 'maps'.



Attendee Surveys

Awareness of BT Cornwall Sponsorship of the event (all attendee survey respondents)

Regatta attendees were asked about their awareness of BT Cornwall as the principle sponsor of the Falmouth Tall Ships Regatta 2014.

Around a quarter of attendees (24%) were aware that BT Cornwall was the principle sponsor of the event and the same proportion were aware of the company before attending the Tall Ships Regatta in Falmouth.

Online survey attendees only were asked if BT Cornwall's sponsorship of the event changed their opinion of them as a company. Three quarters of attendees said it made no difference to their opinion of the company whilst 24% said it changed their opinion of BT Cornwall for the better. 1% of attendees said it changed their opinion of BT Cornwall for the worse.

Just 3% of attendees had visited the BT Cornwall Alfi stand during the regatta.

BT Cornwall	Yes		No
Are you aware that BT Cornwall is the principle sponsor of the Falmouth Tall Ships Regatta 2014?	24%		76%
Were you aware of BT Cornwall before coming to this event?	24%		76%
Does BT Cornwall's sponsorship of this event change your opinion of them as a company? (Online survey attendees only)	Yes, for the better	Yes, for the worse	It makes no difference to me
	24%	1%	75%
Have you visited the Alfi stand delivered by BT Cornwall during your visit to the Falmouth Tall Ships Regatta?	Yes		No
	3%		92%
			Don't know
			5%

Attendee Surveys

Main form of transport used to get to Falmouth on day of visit (all attendee survey respondents)

54% of all attendees had travelled to Falmouth by car, van, motorcycle etc., whilst a further 23% had walked from their homes/accommodation (including 64% of local residents of Falmouth and 19% of those attendees staying overnight in Falmouth). 9% of all attendees arrived by train and a further 5% in each case by bus or boat/ferry.

Main form of transport used to get to Falmouth today	
Car/van /motorcycle	54%
Train	9%
Bus	5%
Boat/ferry	5%
Park & Ride	2%
Bicycle	1%
Walked	23%
Other	2%

Attendee Surveys

Number of regatta days attended (all attendee survey respondents)

29% of all attendees had attended just one day of the regatta including 69% of day visitors, 67% of attendees on holiday staying outside of Cornwall, 49% staying elsewhere in Cornwall and 46% of Cornish residents living outside of Falmouth.

A further 48% of all attendees had visited on two or three event days (27% and 21% respectively).

23% of all attendees had visited on all four days of the regatta including 41% of those on holiday staying in Falmouth and 38% of local residents.

Visitor type	One day	Two days	Three days	All four regatta days
All attendees	29%	27%	21%	23%
A local resident of Falmouth	10%	22%	30%	38%
A resident of Cornwall living elsewhere outside of Falmouth	46%	33%	13%	8%
On holiday staying in Falmouth	9%	21%	29%	41%
On holiday staying elsewhere in Cornwall	49%	31%	16%	5%
On holiday staying outside of Cornwall	67%	33%	-	-
Visiting Cornwall for the day	69%	24%	3%	3%

Attendee Surveys

Average hours spent at the regatta (all attendee survey respondents)

Average duration of stay at the regatta ranged from 4 hours 47 minutes on Thursday 28th August to 5 hours 24 minutes on Sunday 31st August.

Average no. hours spent at the regatta today	Thursday 28 th Aug	Friday 29 th Aug	Saturday 30 th Aug	Sunday 31 st Aug
All attendees	4 hours 47 mins	4 hours 56 mins	5 hours 22 mins	5 hours 24 mins

Attendee Surveys

Event sites visited (all attendee survey respondents)

The proportions of all attendees visiting each of the regatta event sites is shown in the table below.

Events square (77%) and the Docks (74%) were the most popular sites visited across all four days of the event, followed by Custom House Quay (53%), the Prince of Wales Pier (48%), The Moor (47%) and Church Street Car Park (44%).

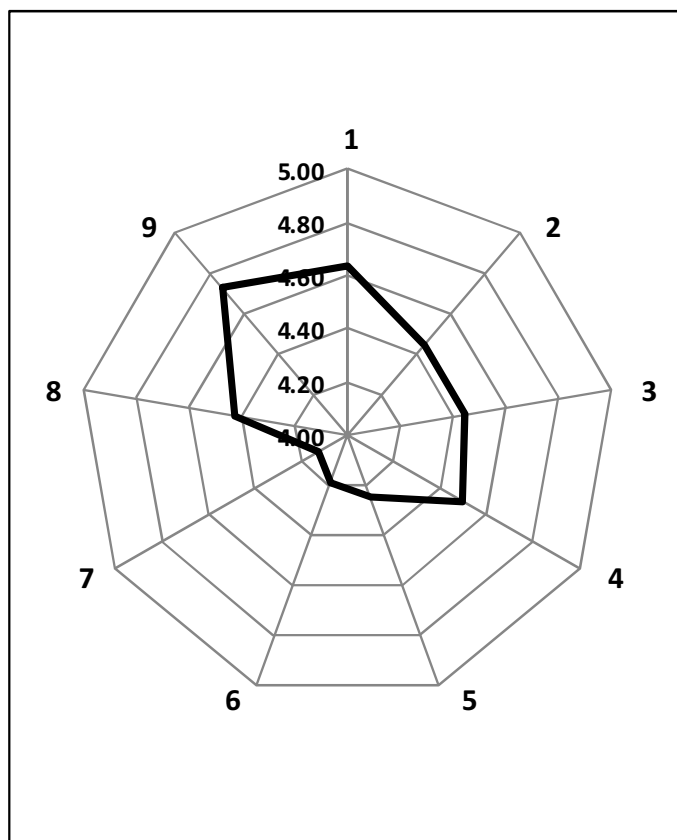
Event site	All days
Events Square	77%
The Docks	74%
Custom House Quay	53%
Prince of Wales Pier	48%
The Moor	47%
Church Street Car Park	44%
Gyllyngvase Beach	34%
National Maritime Museum Cornwall	23%
Pendennis Point	23%
Other viewing point	23%
Swanpool Beach	13%
Castle Beach	11%
Princess Pavilion	9%
Falmouth Art Gallery	7%
Maenporth Beach	5%
None of these	1%

Attendee Surveys

Falmouth Experience - satisfaction levels (all attendee survey respondents)

Attendees were asked to rate their satisfaction with a number of indicators relating to their experience in Falmouth on a scale of 1 to 5, with 1 being 'Very Poor' and 5 being 'Very Good'. The results are displayed in the chart below and in the table opposite.

Attendee satisfaction levels were highest for the overall enjoyment of their visit to Falmouth (4.73) and lowest for the quality of the information provision, although all indicators received very high satisfaction scores of 4.12 or higher. A breakdown of satisfaction levels by visitor type is shown overleaf.



Satisfaction ratings with Falmouth experience		Mean	VP (1)	P (2)	A (3)	G (4)	VG (5)	DK (6)
1	Feeling of welcome	4.64	1%	1%	6%	20%	72%	1%
2	Cleanliness of the streets	4.45	0%	2%	7%	33%	55%	2%
3	Cleanliness of the open-spaces	4.45	1%	1%	8%	33%	55%	2%
4	Quality of the places to eat & drink	4.49	1%	0%	7%	29%	56%	8%
5	Quality of the shopping experience	4.25	1%	2%	10%	31%	36%	21%
6	Flexibility of the shop opening hours	4.19	1%	1%	11%	24%	31%	31%
7	Quality of the information provision	4.12	3%	4%	13%	35%	41%	5%
8	Quality of the customer service	4.43	1%	0%	7%	34%	50%	7%
9	Overall enjoyment of visit	4.73	1%	0%	3%	17%	78%	1%

Attendee Surveys

Attendee satisfaction levels remained high across all visitor types

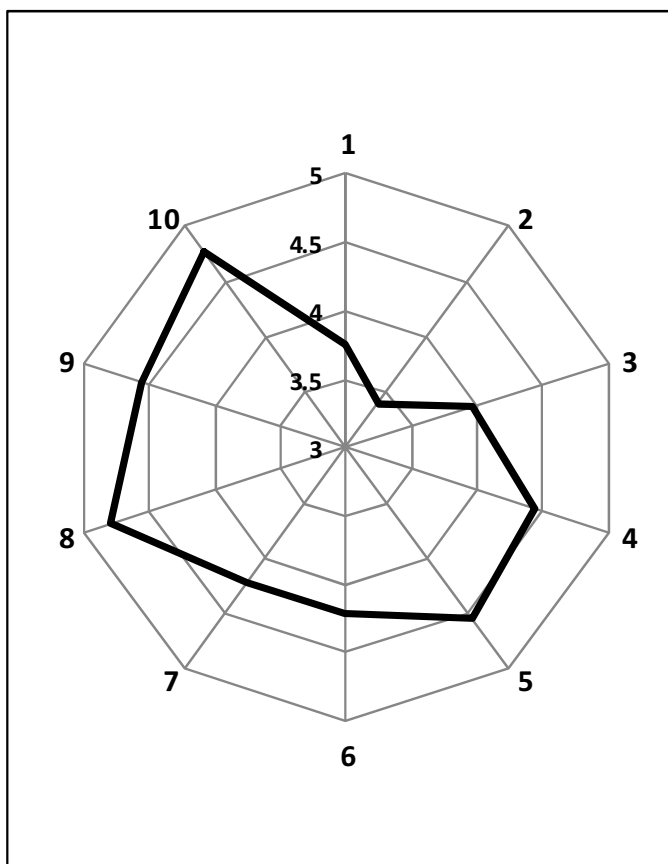
Satisfaction ratings with Falmouth experience		All attendees	A local resident of Falmouth	A resident of Cornwall living elsewhere outside of Falmouth	On holiday staying in Falmouth	On holiday staying elsewhere in Cornwall	On holiday staying outside of Cornwall	Visiting Cornwall for the day
1	Feeling of welcome	4.64	4.74	4.55	4.69	4.56	4.83	4.68
2	Cleanliness of the streets	4.45	4.39	4.43	4.57	4.43	4.33	4.45
3	Cleanliness of the open-spaces	4.45	4.34	4.44	4.58	4.48	4.50	4.41
4	Quality of the places to eat & drink	4.49	4.50	4.48	4.55	4.44	5.00	4.35
5	Quality of the shopping experience	4.25	4.14	4.26	4.37	4.31	4.00	4.32
6	Flexibility of the shop opening hours	4.19	4.15	4.15	4.26	4.26	4.00	4.06
7	Quality of the information provision	4.12	4.16	4.06	4.21	4.07	3.83	4.21
8	Quality of the customer service	4.43	4.50	4.37	4.45	4.39	4.67	4.57
9	Overall enjoyment of visit	4.73	4.76	4.69	4.80	4.66	4.83	4.70

Attendee Surveys

Falmouth Tall Ships Regatta - satisfaction levels (online attendee survey respondents only)

Online survey attendees were also asked to rate their levels of satisfaction with a number of indicators relating to their experience of the Tall Ships Regatta, again on a scale of 1 to 5, with 1 being 'Very Poor' and 5 being 'Very Good'. The results are displayed in the chart below and in the table opposite.

Attendee satisfaction levels were highest for the general atmosphere of the Regatta (4.81) and lowest for the cost of parking during the event. Only two other indicators; the availability of car parking and of public transport during the event (3.76 and 3.96 out of 5.00 respectively) received average satisfaction scores of less than 4.00. 7 out of the 10 indicators explored for the event received an average satisfaction score of 4.22 out of 5.00 or higher. A breakdown of satisfaction levels by visitor type is shown overleaf.



Satisfaction ratings with Falmouth Tall Ships Regatta 2014		Mean	VP (1)	P (2)	A (3)	G (4)	VG (5)	DK (6)
1	Availability of car parking during the regatta	3.76	3%	6%	14%	21%	21%	35%
2	Cost of car parking during the regatta	3.40	5%	8%	19%	14%	14%	41%
3	Availability of public transport during the regatta	3.96	2%	5%	10%	22%	24%	37%
4	Range of events during the regatta	4.44	1%	1%	8%	32%	53%	5%
5	Quality of the free events	4.55	1%	1%	6%	24%	61%	7%
6	The quality of the street entertainment	4.22	1%	2%	13%	32%	40%	13%
7	The availability of regatta information	4.22	2%	5%	11%	30%	49%	3%
8	General atmosphere of the regatta	4.81	1%	0%	2%	11%	85%	1%
9	Assistance provided by event volunteers/staff	4.56	1%	1%	6%	18%	63%	11%
10	Overall enjoyment of the regatta	4.77	1%	1%	3%	11%	83%	1%

Attendee Surveys

Attendee satisfaction levels remained high across all visitor types

Satisfaction ratings with Falmouth Tall Ships Regatta		All attendees	A local resident of Falmouth	A resident of Cornwall living elsewhere outside of Falmouth	On holiday staying in Falmouth	On holiday staying elsewhere in Cornwall	On holiday staying outside of Cornwall	Visiting Cornwall for the day
1	Availability of car parking during the regatta	3.76	3.66	3.92	3.54	3.82	4.00	3.85
2	Cost of car parking during the regatta	3.40	3.28	3.43	3.47	3.54	4.00	3.62
3	Availability of public transport during the regatta	3.96	4.05	3.95	3.81	3.96	3.00	3.93
4	Range of events during the regatta	4.44	4.54	4.41	4.43	4.23	4.00	4.42
5	Quality of the free events	4.55	4.68	4.47	4.55	4.33	NR	4.56
6	The quality of the street entertainment	4.22	4.28	4.14	4.27	4.12	NR	4.29
7	The availability of regatta information	4.22	4.28	4.21	4.22	4.04	4.00	4.38
8	General atmosphere of the regatta	4.81	4.86	4.79	4.79	4.75	5.00	4.81
9	Assistance provided by event volunteers/staff	4.56	4.60	4.53	4.58	4.49	4.00	4.67
10	Overall enjoyment of the regatta	4.77	4.81	4.76	4.80	4.64	5.00	4.68

Attendee Surveys

Recommendation Score – an alternative measure of satisfaction (all attendee survey respondents)

Recommendation scores are a simple but effective method for measuring customer loyalty invented by Bain consultant Fred Reicheld who discovered that a single question provides the ultimate measure of just how loyal customers are and that this method could then be used to accurately predict future revenue growth.

Recommendation scores are calculated by asking a sample of customers a single question “How likely is it that you would recommend xyz to a friend or colleague?”. The respondent is asked to rate on an 11 point scale from ‘0’ (not at all likely) to ‘10’ (extremely likely) depending on how positive they feel about the product/event/location. The proportion of those who think it unlikely they would recommend it (Detractors) subtracted from the proportion that are likely to recommend it (Promoters) produces a single number known as a Recommendation Score.

Based on their response to this question respondents are then divided into three distinct groups:

0-6 score are Detractors *These are customers that have generated sales but are actually bad for the company over the long haul. They are less likely to buy anything/visit the event/location again and more likely to spread bad word of mouth and more costly to serve because of their dissatisfaction.*

7-8 are Passives *These customers are generally more positive about the product/event/location but are significantly less valuable than Promoters. Many companies over estimate their success by assuming relatively high customer satisfaction will lead to future growth. In reality Passives may be satisfied but that may not be enough in the longer term.*

9-10 are Promoters *These customers drive business growth. The company/product/event/location has gone beyond satisfying their needs and truly delights them. As a result they will buy more from this company or visit an event or location again in the future, will recommend it to many others and therefore the company/product/event/location will not need to undertake costly ad campaigns or sales promotions to retain their business.*

The Recommendation Score is created by calculating what percentage of the customer base are Promoters and then subtracting the percentage who are Detractors.

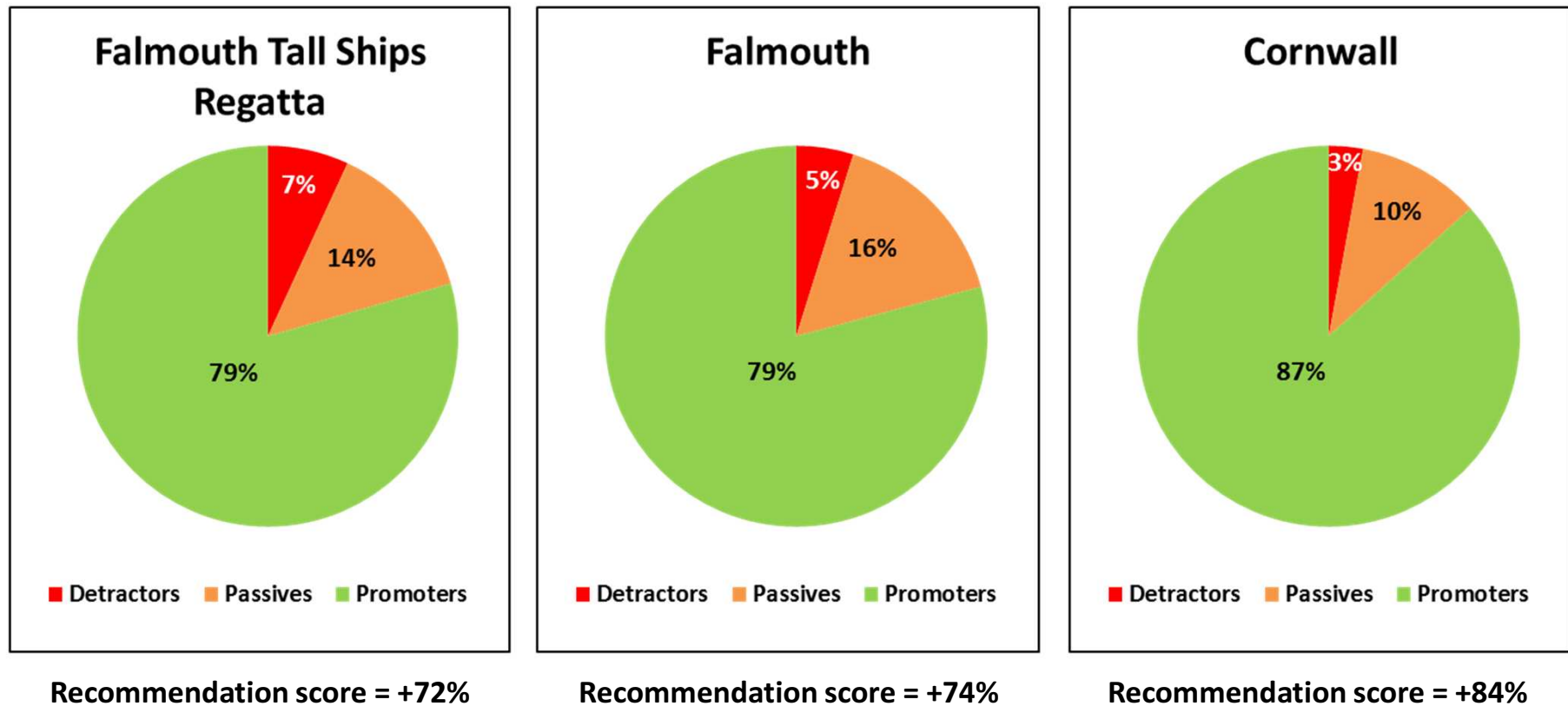
$$\% \text{ Promoters} - \% \text{ Detractors} = \text{RECOMMENDATION SCORE}$$

The higher or more positive the recommendation score the more satisfied the customer base.

Attendee Surveys

Recommendation Score – an alternative measure of satisfaction (all attendee survey respondents)

The 2014 Falmouth Tall Ships evaluation research asked attendees to give their likelihood of recommending the Falmouth Tall Ships Regatta, Falmouth and Cornwall to their friends and family allowing a recommendation score for each to be calculated. The results are shown in the charts below and by visitor type overleaf.



The Falmouth Tall Ships Regatta, Falmouth and Cornwall all received very high recommendation scores of between +72% and +84% on a measure that can range from -100% to +100%. The highest recommendation score was for Cornwall at +84%.

Attendee Surveys

Recommendation Score – an alternative measure of satisfaction (all attendee survey respondents)

Visitor type	Recommendation score		
	Falmouth Tall Ships Regatta	Falmouth	Cornwall
All attendees	+72%	+74%	+84%
A local resident of Falmouth	+84%	+86%	+87%
A resident of Cornwall living elsewhere outside of Falmouth	+72%	+69%	+86%
On holiday staying in Falmouth	+71%	+75%	+81%
On holiday staying elsewhere in Cornwall	+57%	+66%	+80%
On holiday staying outside of Cornwall	+100%	+83%	+83%
Visiting Cornwall for the day	+59%	+69%	+69%

Attendee Surveys

Improving next visit to Falmouth– (all attendee survey respondents)

Face to face and online survey attendees were asked for comments or suggestions they would like to make about making their next visit to Falmouth more enjoyable and rewarding. There were a wide range of responses provided for this question.

A large proportion of survey respondents providing a comment said their visit had been excellent and very enjoyable and that there was nothing which could be done in future to make it more enjoyable for them

Amongst those providing a suggestion or comment regarding improvements, the availability and cost of car parking, better provision of public transport and more information provision were common themes, along with improved signage and public toilet provision in the town.

A number of respondents commented specifically on the Tall Ships themselves saying they had hoped/expected to see more of them and that the queues to board the ships were too long and time consuming.

The Tall Ships event was exceptionally busy
- the queues for the ships were too long.
Insufficient seating.

A fantastic weekend. The atmosphere
was brilliant. Would be brilliant if
Falmouth was like this more often.

Parking! Too expensive and puts
visitors off. Lack of long stay parking.

Thank you organisers
for an amazing
weekend. Very proud
to be from Falmouth.

Better signage around the Docks area and
more volunteers to help me find my way
around.

The event was fantastic and
although the Park and Ride
was expensive (from Penryn)
it was an excellent service.

Better information on the spot such as a constantly updating
information board in the centre of the town.

Attendee Surveys

Specific feedback on the Tall Ships Regatta (online attendee survey respondents)

Online survey attendees were also asked if they had any specific comments to make about the Tall Ships Regatta 2014. Again, a huge range of comments were provided, largely very positive about the event and a sample of some of these are shown below.

A unique experience which Falmouth and the organisers should be very proud of! Looking forward to next time!

As a resident... It was awesome to see the town buzzing. The atmosphere was great! Well done and thank you.

An amazing experience. We were lucky enough to be on the water in a small boat and it was simply breath-taking.

A wonderful event, well organised and the live music and street entertainment was amazing and really enjoyable.

Bit disappointed that the start of the race was so far out to sea.

Event volunteers didn't know enough. Programme for some events were not scheduled correctly.

A wonderful experience, great organisation, fantastic entertainment. I loved every minute of it.

Falmouth Tall Ships 2014 was the best yet. Fantastic atmosphere, really well organised, so much free entertainment.

Fireworks display could have been better.

Hoping and looking forward to Falmouth hosting this prestigious event again very soon in the future.

Everything was brilliant apart from the park and ride too many buses and they caused traffic jams.

Fab atmosphere but I would like to see more in the street as entertainment or stalls and things for the family.

Get the information right about what times the ships can be accessed.

Attendee Surveys

Reasons for not attending (online attendee survey respondents)

50 online survey respondents who logged on to take part in the survey indicated at Q1 that they had not attended any events organised as part of the 2014 Tall Ships Regatta in Falmouth. These respondents were then redirected to the end of the survey and asked if there were any specific reasons why they did not attend. A sample of some of these are shown below.

I had a full view of everything from my home windows also walked the sea front to view

I live in Birmingham, and was disappointed with the lack of webcam & video coverage of the event

Working through most of it and my only option was arriving on Saturday at 8:30am to find I could not visit before 10:00am.

Too much traffic confusion!

I had already arranged annual holiday

Too much traffic nowhere to park

Inconvenience to local people, not able to move around your own town and the council etc. out to make as much money as possible and it doesn't go towards local projects.

Did not hear about it until Friday 29th August.

As a 70 year old ex sailor I would love to have visited the Regatta, unfortunately there was no publicity of this in the London area. Please could this event be published nationally so that people could come to Falmouth for a holiday and to see these wonderful ships.

Parking restrictions and road closures seemed to make it difficult for someone from out of town to get in without paying out for Park and Ride

We thought that parking or public transport would be a nightmare with so many visitors to Falmouth.

i am disabled and unable to walk very far

Falmouth Tall Ships 2014 Evaluation

Appendix 2 – Business Survey Results



Business Survey

Local business data was captured using an online survey amongst businesses based in Falmouth and Cornwall including accommodation establishments, local leisure/attraction operators, town centre retailers and public transport operators.

The business survey explored areas such as the impact of the Tall Ships Regatta on business turnover, the impact of the regatta on staffing levels and any positive/negative impacts of the event.

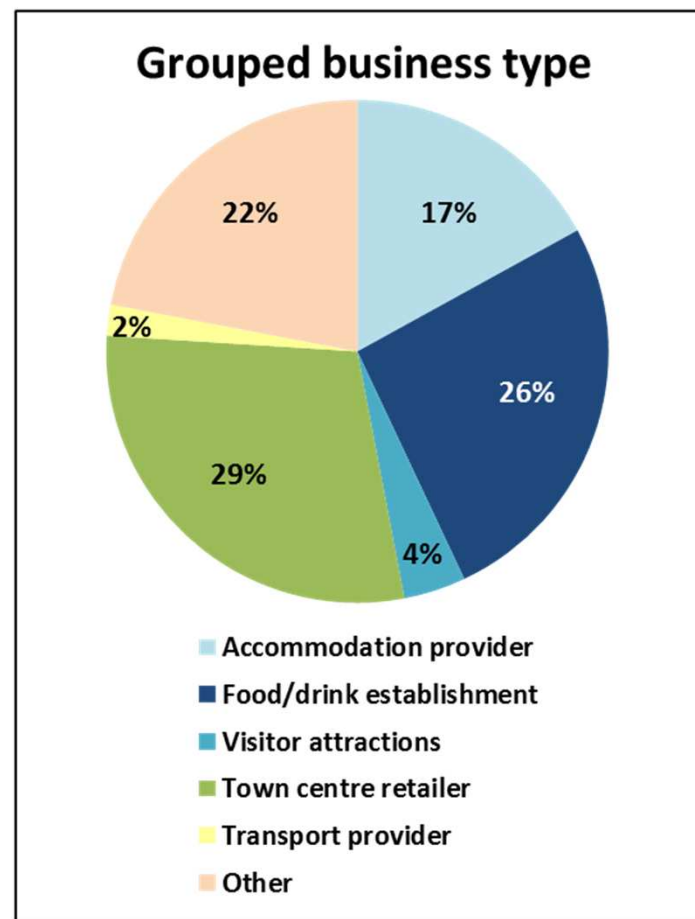
The survey results for the 157 businesses who completed the questionnaire are detailed on the slides to follow. The sample captured provides a good evidence base to help guide the future of the regatta. Please note however, that when considering the breakdown of results by business type data should be interpreted with caution due to the smaller sample sizes involved.

Business Survey

Type of business

29% of the businesses responding to the survey were town centre retailers in Falmouth. 26% of businesses were food or drink establishments including a local restaurant (9%), take-away/fast food outlet (6%), a café (6%) or a pub (5%). A further 17% of businesses were serviced accommodation providers including 10% B&B's/guest houses/farm houses, 5% hotels and 3% self catering accommodation operators. 4% of businesses were visitor attractions. 22% of respondents represented other types of businesses including leisure/sports facilities, supermarkets and cinemas/theatres.

Business type			
Town centre retailer	29%	Visitor attraction	4%
Other	19%	Self catering accommodation	3%
B&B/guest house/farm house	10%	Taxi firm	1%
Restaurant	9%	Leisure/sports facility	1%
Take-away/fast food outlet	6%	Public transport provider	1%
Café	6%	Supermarket	1%
Hotel	5%	Cinema/theatre	1%
Pub	5%		



Business Survey

Location of business

96% of the businesses responding to the survey were located in Falmouth with little variation according to business type. 17% of attractions, 9% of other businesses, 4% of accommodation providers and 2% of food and drink establishments were based outside of Falmouth.

Location by business type	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Falmouth	96%	96%	98%	83%	100%	100%	91%
Other Cornwall	2%	4%	-	-	-	-	6%
North Cornwall coast	1%	-	2%	-	-	-	-
South Cornwall coast (excluding Falmouth)	1%	-	-	-	-	-	3%
West Cornwall	1%	-	-	17%	-	-	-
Base	157	27	42	6	45	3	34

Location of business outlets

78% of the businesses responding to the survey had business outlets in Falmouth only with this proportion highest amongst accommodation providers and food and drink establishments (89% and 81% respectively). A further 8% of businesses had outlets in Cornwall only (33% of transport providers) whilst a similar proportion (7%) had outlets nationwide (33% of visitor attractions).

Location by business type	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Falmouth only	78%	89%	81%	50%	76%	67%	76%
Cornwall only	8%	7%	5%	17%	2%	33%	15%
Nationwide	7%	-	10%	33%	9%	-	3%
Globally	4%	-	2%	-	7%	-	6%
South West only	3%	4%	2%	-	7%	-	-
Base	157	27	42	6	45	3	34

Business Survey

Whether extended opening hours as a result of the regatta

40% of businesses surveyed had extended their opening hours as a result of the Tall Ships Regatta taking place.

Impact on business turnover

Overall, 65% of businesses participating in the survey indicated that the event had impacted on their business turnover.

Whether the regatta had an impact on business turnover	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Yes	65%	41%	90%	100%	71%	67%	38%
No	35%	59%	10%	-	29%	33%	62%
Base	157	27	42	6	45	3	34

86% of these businesses said that their business turnover had been higher than normal, whilst 14% of the businesses reported that their turnover had been lower than normal during the regatta.

Whether business turnover was... (business for whom the regatta had impacted on their turnover only)	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Higher than normal	86%	73%	100%	100%	72%	100%	85%
Lower than normal	14%	27%	-	-	28%	-	15%
Base	102	11	38	6	32	2	13

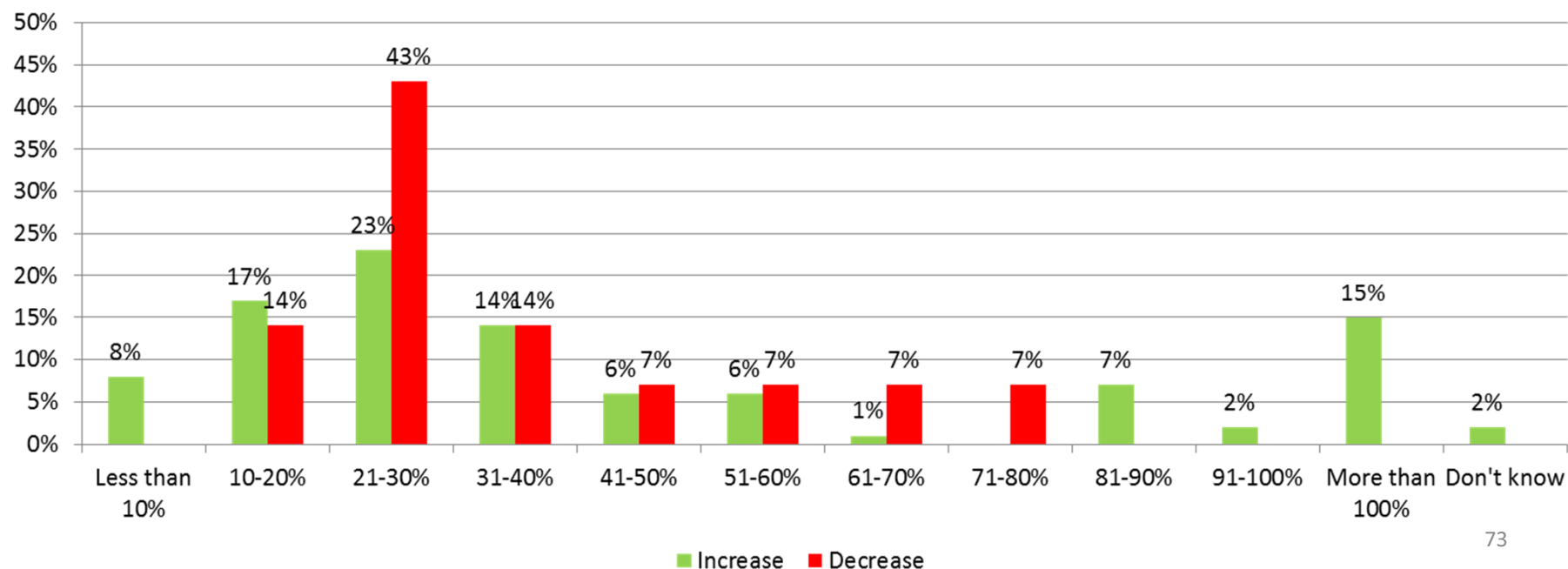
Business Survey

Impact on business turnover

Those businesses who indicated that their turnover had changed as a result of the regatta were asked to indicate the scale of any increases or decreases in their business turnover compared to a normal non-regatta period in August. The majority of businesses reporting both increased and decreased turnover reported changes of less than 40% (62% of businesses reporting increases and 71% of businesses reporting decreases).

A further 13% of businesses reporting increases reported increased turnover of between 41-70% and a further 26% in excess of 100%, whilst a further 28% of businesses reporting decreases reported percentage changes of between 41-80%.

23 of the businesses were able to give an actual estimated value of the increase in their turnover as a result of the regatta the average of which was £10,097. 13 of the 14 businesses indicating that their turnover had decreased as a result of the event provided an actual estimate of the value of the decrease which was calculated at £5,138.



Business Survey

Whether increased staff levels during the Tall Ships regatta 2014

Overall, 47% of businesses indicated that they had increased their levels of staff during the regatta. The average number of additional staff employed was 3.03 or 8.68 additional staff days.

Whether increased staffing levels for the regatta	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Yes	47%	30%	83%	83%	38%	33%	24%
No	53%	70%	17%	17%	62%	67%	76%
Base	157	27	42	6	45	3	34

Business Survey

Whether business turnover changed the week before or after the Tall Ships Regatta

Overall, 64% of businesses participating in the survey indicated that their business turnover had remained the same/normal in the week commencing 18th August 2014 in the run up to the start of the event on the 28th August 2014. A further 32% said their turnover had increased and 4% that it had decreased.

Whether the regatta had an impact on business turnover the week before the Tall Ships Regatta (w/c 18 th August 2014)	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Yes – increased	32%	15%	45%	33%	31%	33%	29%
Yes – decreased	4%	7%	7%	-	-	-	6%
No - remained the same/normal	64%	78%	48%	67%	69%	67%	65%
Base	157	27	42	6	45	3	34

A further 62% of these businesses indicated that their business turnover had remained the same/normal in the week after the event (w/c 1st September 2014). A further 24% said their turnover had increased and 13% that it had decreased.

Whether the regatta had an impact on business turnover the week after the Tall Ships Regatta (w/c 1 st Sept 2014)	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Yes – increased	24%	15%	36%	-	22%	67%	21%
Yes – decreased	13%	7%	17%	-	20%	33%	6%
No - remained the same/normal	62%	78%	48%	100%	58%	-	74%
Base	157	27	42	6	45	3	34

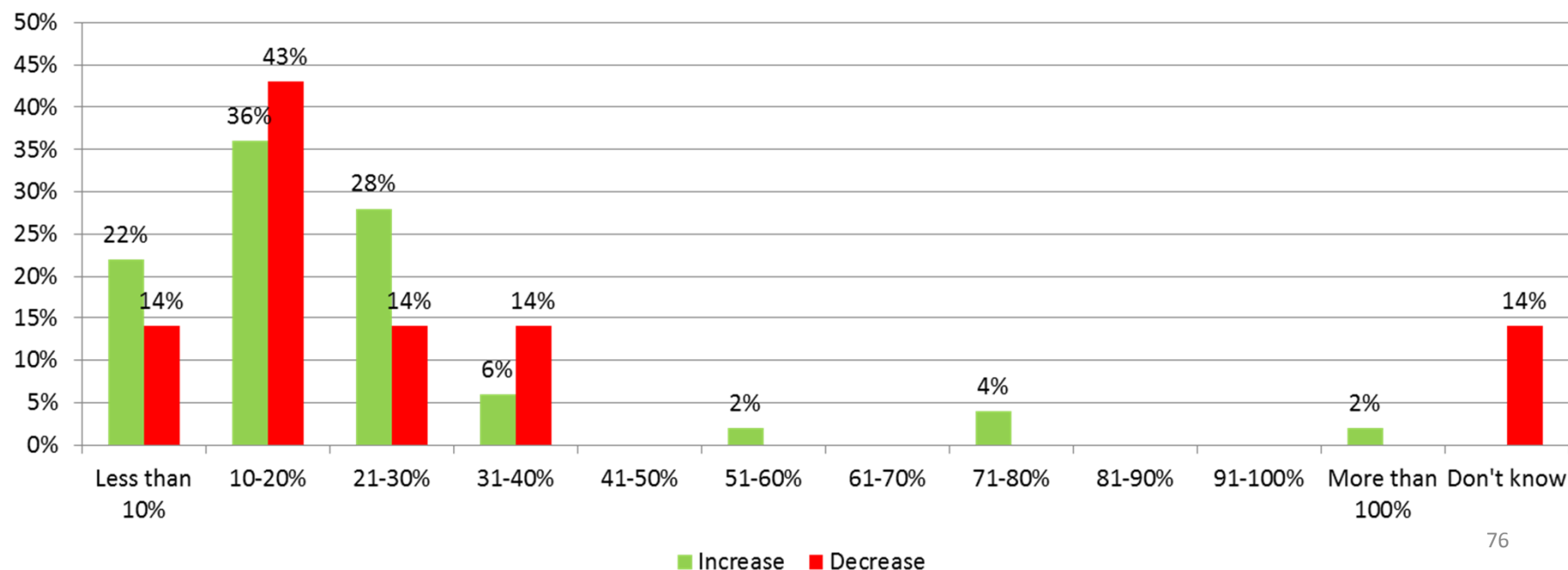
Business Survey

Impact on business turnover the week before the event (w/c 18th August 2014)

Those businesses who indicated that their turnover had changed the week before the event (w/c 18th August) were asked to indicate the scale of any increases or decreases in their business turnover. The majority of businesses reporting both increased and decreased turnover reported changes of less than 40% (92% of businesses reporting increases and 85% of businesses reporting decreases).

A further 6% of businesses reporting increases reported increased turnover of between 51-80% and a further 2% in excess of 100%. 14% of businesses reporting decreases did not know the scale of the negative impact on their business turnover.

36 of the 50 businesses reporting increases were able to give an actual estimated value of the increase in their turnover the week before the regatta the average of which was £5,061. 5 of the 7 businesses indicating that their turnover had decreased the week before the event provided an actual estimate of the value of the decrease which was calculated at £4,660.



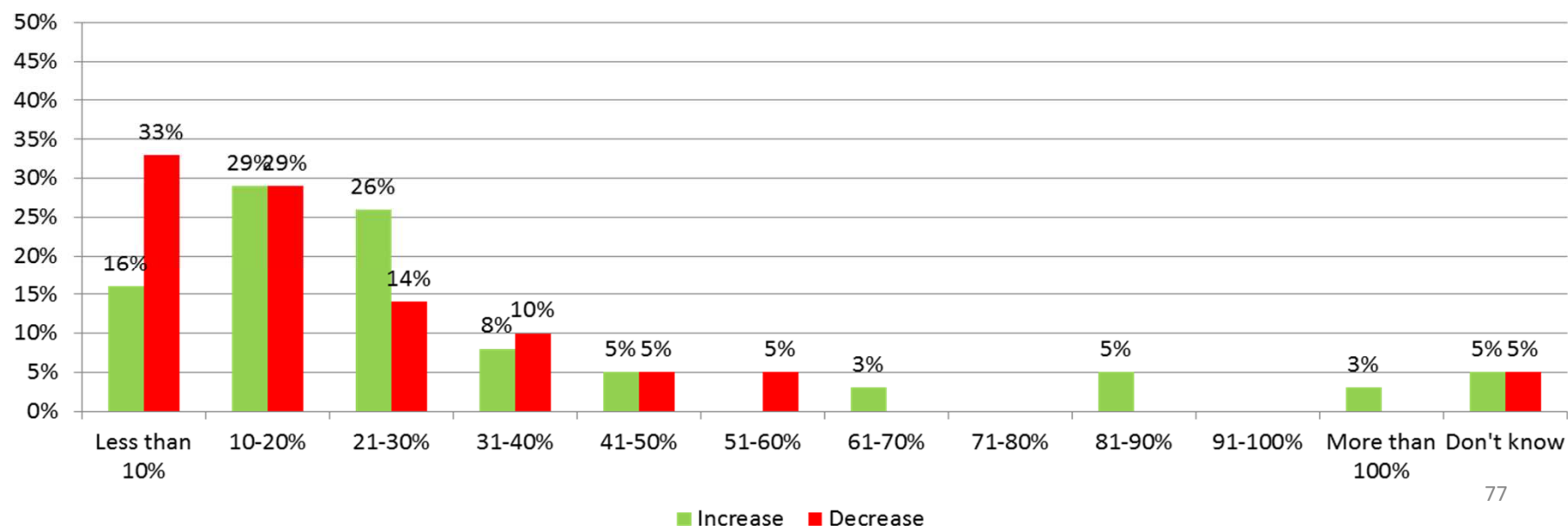
Business Survey

Impact on business turnover the week after the event (w/c 1st September 2014)

Those businesses who indicated that their turnover had changed the week after the event (w/c 1st September) were asked to indicate the scale of any increases or decreases in their business turnover. The majority of businesses reporting both increased and decreased turnover reported changes of less than 30% (71% of businesses reporting increases and 76% of businesses reporting decreases).

A further 21% of businesses reporting increases reported increased turnover of between 31-90% and a further 3% in excess of 100% whilst 20% of businesses reporting decreases reported decreased turnover of between 31-60%. 5% of businesses reporting increases and decreases in each case did not know the scale of the impacts on their business turnover.

26 of the 38 businesses reporting increases were able to give an actual estimated value of the increase in their turnover the week before the regatta the average of which was £6,506. 17 of the 21 businesses indicating that their turnover had decreased the week before the event provided an actual estimate of the value of the decrease which was calculated at £3,650.



Business Survey

Negative impacts of the Tall Ships Regatta 2014

Businesses were asked how they felt the Tall Ships event had impacted negatively on their business.

A wide range of comments were given. The majority of the comments relating to any negative impacts were centred around the access to the town, difficulties in parking and how busy and crowded the town was making it difficult to move around easily.

A full list of the comments provided can be found in the appendix which accompanies this report and a sample of some of the comments provided is shown below.

The one day parking restrictions on 31st August had a negative impact on guests/tourists parking in the Gyllyngvase area. This was aggressively policed and parking tickets issued to every car in an area that normally has no restrictions. This was a disgusting and blatant piece of profiteering by the local town/county council and left a very bad taste in the mouth for visiting guests.

Whilst many hospitality and catering sectors clearly benefitted from the Regatta the same could not be said for the retail sector; poor parking arrangements were a great concern. Had Grove Place been changed to a maximum 1 hour or perhaps 1 1/2 hours this would have encouraged shoppers. Disappointing when you consider that after the summer who does the town look to - the High Street?

Visitors come to see the tall ships not to spend money in the shops. We have been trading in Falmouth for 50 years this year and the pattern is always the same.

We felt that a lot of trade was at far end of town near events square etc.

Some deliveries not able to get through.

Some customers cancelled bookings as they couldn't get through the traffic on route to our premises!

Too many people not wanting to spend any money other than on food and drink.

People only want to pay so much money for accommodation and frankly, once it was sold there was no scope for anymore to be made. Also, the Tall Ships was only four days and, at the end of the day, four days worth of accommodation, or even a week if one is crafty enough to impose that on people, isn't going to sustain a bed and breakfast through the rest of the year.

Business Survey

Business Development as a result of the Tall Ships Regatta

45% of businesses surveyed had undertaken some form of business development as a result of the Tall Ships Regatta taking place.

Business development undertaken as a result of the Tall Ships Regatta taking place	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Extra advertising/promotion	66%	50%	44%	100%	78%	100%	83%
Extra products/lines	54%	17%	63%	33%	72%	100%	33%
Special exhibitions/displays	33%	17%	19%	50%	44%	100%	42%
Produced special items for the event	21%	-	22%	-	39%	100%	8%
Provided extra hospitality for clients	20%	33%	19%	50%	6%	100%	17%
Conducted a special mail shot	9%	17%	4%	-	17%	100%	-
Other	7%	33%	-	17%	-	-	17%

Two thirds of businesses undertaking some form of business development as a result of the Tall Ships Regatta taking place had undertaken extra advertising/promotion whilst 54% had introduced extra products/lines during the event. A third had undertaken special exhibitions or displays as a result of the event, 21% had produced special items for the Tall Ships and a similar proportion (20%) had provided extra hospitality for clients during the regatta.

Business Survey

Level of involvement with the Tall Ships Regatta

11% of businesses responding to the survey were part of the town working group for the Tall Ships Regatta 2014.

Whether part of the town working group for the event	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Yes	11%	7%	7%	100%	2%	33%	12%
No	89%	93%	93%	-	98%	67%	88%
Base	157	27	42	6	45	3	34

A further 18% of businesses had sponsored or supported the event in some way.

Whether sponsored or supported the event	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Yes	18%	19%	7%	50%	18%	33%	26%
No	82%	81%	93%	50%	82%	67%	74%
Base	157	27	42	6	45	3	34

Business Survey

Affects of the Tall Ships Regatta

41% of businesses responding to the survey indicated that the Tall Ships Regatta 2014 had affected their suppliers, 47% that it had affected their customers, 22% their employees ability to work normally and 24% their own ability to work normally.

Whether the Tall Ships Regatta 2014 affected any of the following:	Your suppliers	Your customers	Your employees ability to work normally	Your own ability to work normally
Yes	41%	47%	22%	24%
No	46%	38%	72%	74%
Don't know	12%	15%	6%	3%
Base: All businesses 157				

A number of comments were made regarding how the event had affected suppliers, customers, employees and their own ability to work normally and these can be read in full in the appendix with accompanies this report.

By far the overwhelming issue affecting all the above was gaining access to the town for deliveries, parking etc.

Deliveries were disrupted due to road closures over the 4 days

Normal customers could not park in town and were affected by number of additional visitors

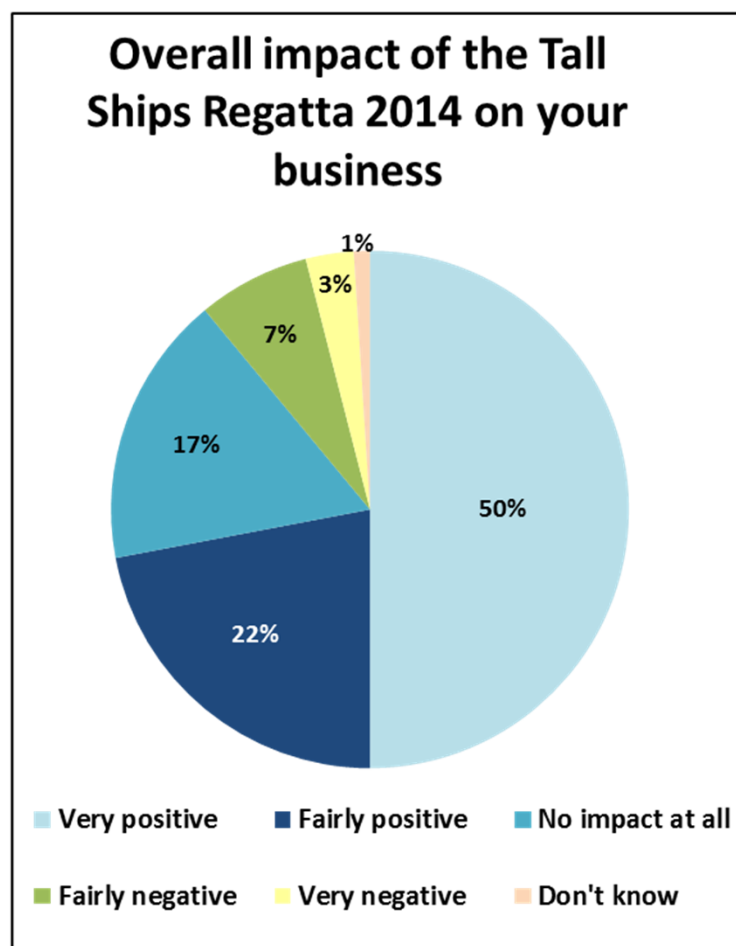
Poor parking meant some of our staff struggled to get into work, large tailbacks caused lateness.

Road closures resulting in problems getting to and from points around/in town.

Business Survey

Overall impact of the Tall Ships Regatta to the economy of Falmouth

72% of businesses said the overall impact of the regatta on their business had been 'very positive' (50%) or 'fairly positive' (22%). 17% said the event had no impact at all on their business and just 10% that it had impacted 'fairly' negatively (7%) or 'very negatively' (3%).



	Fairly positive	Very positive	No impact at all	Fairly negative	Very negative	Don't know
All businesses	50%	22%	17%	7%	3%	1%
Accommodation provider	48%	7%	33%	4%	4%	4%
Food/drink establishment	67%	26%	7%	-	-	-
Visitor attractions	100%	-	-	-	-	-
Town centre retailer	33%	33%	13%	13%	7%	-
Transport provider	100%	-	-	-	-	-
Other	38%	21%	26%	12%	-	3%

Business Survey

Importance of the Tall Ships Regatta to the economy of Falmouth

Businesses were asked to indicate how important they felt the regatta was to the economy of Falmouth. 87% of businesses felt that it was of great importance and a further 11% of some importance. 2% felt it was of no importance to the economy of the town.

Importance of regatta to the general economy of Falmouth	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Of great importance	87%	85%	98%	83%	71%	100%	94%
Of some importance	11%	11%	-	17%	27%	-	6%
Of no importance	2%	4%	2%	-	2%	-	-
Base	157	27	42	6	45	3	34

Importance of the Tall Ships Regatta to the overall image of Falmouth

Businesses were then asked to indicate how important they felt the regatta was to the overall image of Falmouth. Overall, 89% of businesses felt that it was of great importance and a further 10% of some importance to the overall image of the town. Just 2% of businesses felt the regatta was of no importance to the overall image of the town.

Importance of regatta to the overall image of Falmouth	All businesses	Accommodation provider	Food/drink establishment	Visitor attractions	Town centre retailer	Transport provider	Other
Of great importance	89%	85%	95%	83%	82%	100%	91%
Of some importance	10%	11%	2%	17%	16%	-	9%
Of no importance	2%	4%	2%	-	2%	-	-
Base	157	27	42	6	45	3	34

Business Survey

Suggested improvements

Businesses were asked what they thought could be done to improve the regatta in the future.

A wide range of comments were given, indeed, the majority were very positive comments on how well organised and fantastic the event was. The majority of the specific comments relating to suggested improvements were centred around the access/parking and public transport for the event, road closures etc.

A full list of the comments provided can be found in the appendix which accompanies this report and a sample of some of the comments provided is shown below.

Very little, the event was a great success in my view. Integration between the town and the boats is always a challenge, but the town was full of life, and it was such a benefit holding in the school holidays/summer season. Maybe more in the way of river transport but generally very good.

Nothing.. it was superbly run. Our problems are that we rely on public parking for our guests which is a nightmare at such a time and we are always full at maximum income during this time of the year anyway but great for the town!

Parking is always going to be a problem in Falmouth, especially when some of the car parks are closed for the occasion. The car park signs should say whether a car park has spaces or not, not just turned off.

A lot more activity needed at The Moor end of town rather than that awful music that was being played put something on there that people really want to see. Also the parking tickets that were issued will put some people off coming to Falmouth.

As best as I could see you did a great job. Any way of reducing the queues to visit the ships?

It was a superb flotilla but lacked the really big square riggers so their presence at any future tall ships would be paramount.

Better parking, more communication with stores (I was not visited once during the period or before/after the event). More planned events or positive advertising regarding shopping in Falmouth.

Business Survey

Other comments

Finally, businesses were asked for any other comments relating to the regatta. Please see the accompanying appendix for the list of responses.

A wide range of comments were given and again, like the suggestions for improvements, the majority were very positive comments on how fantastic the event was.

A full list of the comments provided can be found in the appendix which accompanies this report and a sample of some of the comments provided is shown below.

A fantastic event with great credit to the organisers and the town

A great event; loved by everyone. Well organised and a superb success. Can't wait until the next one!!

I am still overawed by the whole event and so is everyone I speak to- it was amazing and I am so grateful to everyone who made it possible

I think that everyone will echo what I have to say but the groups of organisers from the Harbour Office to The Tall Ships committee and town manager and many, many, more including all the volunteers who made this all possible, should give themselves a huge pat on the back. It was a sensational event and topped by great weather and a huge carnival atmosphere enveloped by the whole town which showed Falmouth off at its best as an extremely friendly, fun loving, welcoming town with a big heart! Visitors were loving it and many have promised to come back. It really was the boost that we all needed and wholeheartedly deserved. Thank you to all who gave up their precious time to make this another memorable occasion.

Lots of people and great atmosphere but a serious lack of spending unless you were a coffee shop or a food outlet.

Fantastic event for Falmouth and the West Country. The happy feel within the town certainly pleased the customers that I, and my staff, spoke to. Excellent publicity achieved which can only help to promote Falmouth as a future destination for all and for many years to come. A well done to all the organisers and volunteers.

Falmouth Tall Ships 2014 Evaluation

Appendix 3 – 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 Carrick district data in the Value of Tourism report produced annually by South West Tourism.

The economic impact is based on the estimates of spending by staying and day visitors. The second stage of the Model uses these estimates of expenditure by different visitor groups within the local area 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.

Overview of the model and multipliers

The Model divides the expenditure between five sectors:

- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

Cambridge Model

Overview of the model and multipliers

By applying the expenditure breakdown to the estimates of visitor spending, the Model generates estimates of total spending by the five business sectors. 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 equally likely to take place in the origin of the trip as the destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

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. A portion of that turnover will be absorbed by wages for staff and drawings for the proprietors. The proportion will vary by business sector, thus wages are likely to be a smaller proportion of costs in retailing compared to accommodation or catering. The Model uses data from the Business Information base to ascribe an average proportion of turnover taken by wage and drawing costs for each business sector. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated.

The ASHE survey provides data from which the average wage costs by business sector, adjusted to take account of regional differences, can be calculated. It also provides information on variations in earnings at District level, allowing the relative differences between District and Regional wage levels to be estimated. After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job in each sector can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job in each sector in the local area.

Additional indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services. However part of this expenditure will go to sources elsewhere in the region or even further afield. The level of local spending will vary by the degree of economic development in the local area. Thus cities and major urban areas are likely to have a much higher proportion of suppliers than rural areas, so that the leakage of supply spending out of the local area is higher in the latter. The pattern also varies by sector, with accommodation and catering businesses often purchasing fresh food supplies locally, whereas many retail and transport businesses buy in the bulk of stock from major depots and suppliers elsewhere.

Cambridge Model

Overview of the model and multipliers

Using data from the Business Information base, the average proportion of business turnover spent on local purchases by sector by type of area has been estimated. By applying that proportion to the additional business turnover arising from visitor spending, an estimate of the local spending on goods and services can be made. Such linkage spending will benefit a wide range of sectors ranging from producers including farmers and manufacturers, distributors, and service providers such as lawyers, bankers and window cleaners. The average turnover required to support a full time job vary widely by sector. The Model therefore assumes a figure of £55,000 turnover to support an additional linkage job. By applying this figure to the turnover re-spent on local goods and services, an estimate of the number of indirect jobs arising in the local area can be estimated. Business purchases outside the local area will generate additional jobs elsewhere in the region and beyond, but these additional jobs are not captured in the model beyond the county level.

In addition to the direct jobs and indirect linkage jobs supported in the local area by visitor spending, additional employment will be generated by multiplier effects, i.e. additional employment supported by the expenditure of wages earned in the direct and linkage jobs in the local area. Such multiplier jobs will again be spread across a wide range of sectors including retailing, catering and transport as well as public service jobs such as education, health and local government. The degree of multiplier effect will depend on the nature of the local economy, since the number of higher-level services tends to be concentrated in larger urban centres. The Model therefore uses average local multiplier ratios based on national studies ranging from 1:1.05 in rural locations to 1:1.15 or more in city locations. The multiplier ratio is applied to the total of direct and linkage jobs estimated in the local area. It should be noted that additional multiplier effects would arise outside the local area in the wider region.

The Model generates estimates of full time equivalent jobs based on visitor spending. However the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending. In general, the conversion factor varies around 1.5 in those sectors. The indirect and induced jobs arise across a much wider range of employment sectors. Therefore the average of 1.16 for all service sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs. The employment estimates generated by the Model include both self employed and employed people supported by visitor expenditure. However they do not include other tourism related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences and maintenance sections, and jobs arising from capital investment in tourism facilities.

Falmouth Tall Ships 2014

Evaluation

The South West Research Company Ltd

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