



Final Report

Economic Impact and Evaluation of the Funchal 500 Tall Ships Regatta in Falmouth

For

Carrick District Council

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Executive Summary

This research and evaluation programme was commissioned by Carrick District Council, lead partner of the Funchal 500 Tall Ships Regatta in Falmouth, to determine the economic impact of the event on the town of Falmouth and the wider surrounding area. The study involved consultation with visitors to the event between the 10th and 13th September and businesses in the Falmouth area and further afield across Cornwall to evaluate the reach of the impact, specifically:

- To estimate the number of visitors to the Regatta on the four days of the event;
- To calculate the expenditure for all visitors and for those who would not have visited Falmouth had it not been for the Tall Ships event;
- To produce the overall volume and value generated;
- To provide profiles of both the type of visitor and the nature of the trip, plus satisfaction levels with the event; and
- To ascertain the impact of the Regatta on turnover and operation of retail, tourism and other commercial businesses in Falmouth.

It should be noted that this study looks only at the direct impacts of the Funchal 500 Tall Ships Regatta. Indirect and induced impacts to the economy, such as increased purchasing by suppliers and visits to the area at a later date by event visitors who were consequently inspired to revisit, plus the promotional value of raising Falmouth's profile as a visitor destination would require more in-depth analysis than was conducted for this study.

The research identified a series of key findings associated with the overall impact of the Funchal 500 Tall Ships Regatta on Falmouth and the surrounding area, linked to:

- **Visitor numbers and expenditure;**
 - Over 66,000 visitors came to the Tall Ships Regatta on a total of the 111,500 days
 - Over £12million of direct expenditure was generated for the local economy
 - Around £6million identified as additional expenditure
 - Daily spend was high (£19.20- day, £34.24- staying) in line with visitors to Cornwall
 - 2008 Regatta visitors spent more on travel than general visitors to Cornwall
 - Race day spend was relatively high with higher travel spend than the other days
- **Visit patterns and trends;**
 - High level of interest and satisfaction were found amongst visitors
 - Half of all visitors would not have otherwise visited during Regatta week
 - Dominance of short break and additional holiday market segments
 - Many made repeat visits
 - Almost three quarters found the Regatta sufficient for occupying their full trip
 - Average length of stay was around 6 hours.
- **Visitor profiles; and**
 - High proportion of day visits and short breaks from nearby counties
 - Timing impacted on visitor types: smaller groups, older audience, less employed visitors
 - 59% of employed visitors were ABC1s compared with 53% to Cornwall generally
- **Impact on local businesses.**

- Confidence that events like the Regatta are good for the local area
- Nearly half experienced changes in turnover, most of which were positive
- One in ten saw a 50% increase, an additional £3258.71 on the same time last year
- Almost one fifth reported a 20% increase, equating to an additional £1303.48
- Demand exceeded availability for many accommodation providers
- Impact mainly felt within Carrick, but extended as far as Looe and Bude in the East
- For most, the event did not affect their ability to operate as normal
- Many experienced increased custom
- Some (those located on the Moor) lost regular customers to the opposite end of town

There are several lessons that can be learned from the Funchal 500 Tall Ships Regatta 2008 that should be addressed for future events in Falmouth, wider Carrick or Cornwall on the whole. These include:

- **Resourcing an improved visitor count.** The improved accuracy of figures through use of a helicopter to provide aerial shots of the crowds around the headlands on race day and to allow for a large number of volunteers conducting the visitor count, would help to ensure that a robust foundation is developed upon which strategic decisions about visitor numbers can be made.
- **Revision of the survey method to incorporate more spectator interview locations.** In addition to resourcing an improved visitor count, an increased number of visitor survey interviews conducted at more spectator locations along the headlands, would also help to achieve a more robust set of Race day and spectator data.
- **The use of signage to re-direct visitor footfall.** Improving the amount and location of event signage displayed around the host town at future events would help to re-direct pedestrian flow and draw people to otherwise neglected areas.
- **Development of targeted marketing approaches for similar events.** A clear profile emerged of the visitors attracted to the Funchal 500 Tall Ships Regatta. This presents opportunities to target marketing efforts for future similar events at specific market segments, potentially addressing a wider (if not national) audience.
- **Consideration of accommodation supply.** The Visitor and Business Surveys both uncovered a demand for accommodation in and around Falmouth that outstripped supply. In some cases, visitors making an additional trip specifically for the Regatta were found to be staying outside of the Carrick district. Consideration of available bed spaces and potential solutions in the early event planning stages (i.e. use of University accommodation during holiday season as an over-flow facility) could help to maximise the economic impact of the event.
- **Consideration of event timing.** The 2008 Regatta took place from Wednesday through to Saturday (3 of 4 days were working weekdays) and in mid September after the start of the new school term (it should be noted that the timing for the event was fixed by the Regatta Race organisers). These factors undoubtedly had an impact on visitor numbers and visitor types to the event and therefore, consideration must be given wherever possible to the timing of the event and the desired audience at the planning stage.

1. Introduction

This research and evaluation programme was commissioned by Carrick District Council, lead partner of the Funchal 500 Tall Ships Regatta in Falmouth, to determine the economic impact of the event on the town of Falmouth and the wider surrounding area. The study involved consultation with visitors to the event between the 10th and 13th September and businesses in the Falmouth area and further afield across Cornwall to evaluate the reach of the impact.

1.1 Aims and objectives

The overall aim of this study was to provide detailed and statistically robust evidence for the economic impact of the Funchal 500 Tall Ships Regatta on Falmouth, in terms of the volume and value of visits generated and effects on local businesses. More specifically, the objectives were:

- To estimate the number of visitors to the Regatta on the four days of the event;
- To calculate the expenditure for all visitors and for those who would not have visited Falmouth had it not been for the Tall Ships event;
- To produce the overall volume and value generated;
- To provide profiles of both the type of visitor and the nature of the trip, plus satisfaction levels with the event; and
- To ascertain the impact of the Regatta on turnover and operation of retail, tourism and other commercial businesses in Falmouth.

It should be noted that this study looks only at the direct impacts of the Funchal 500 Tall Ships Regatta. Indirect and induced impacts to the economy, such as increased purchasing by suppliers and visits to the area at a later date by event visitors who were consequently inspired to revisit, plus the promotional value of raising Falmouth's profile as a visitor destination would require more in-depth analysis than was conducted for this study.

1.2 Method and approach

This impact study focussed on a quantitative methodology for the primary research elements in order to yield a volume of information about the visitor numbers, patterns and trends (including visitor profiles), expenditure for all visitors and for those who would not have visited Falmouth if the Tall Ships Regatta did not take place, and satisfaction levels as well as the impact that the event had on the turnover and operation of businesses in Falmouth and wider Cornwall. Visitors and businesses alike were consulted via five primary research strands (face-to-face visitor surveys, self-completion visitor questionnaires, postal, telephone or electronic business survey).

1.2.1 Visitor survey

In total, 436 completed visitor surveys were obtained. Of these, 400 face-to-face surveys were completed with visitors to the Regatta, across all four days of the event and sampled at each of the main event sites: The Docks, Events Square, Church Street Car Park, Custom House Quay and

Gyllyngvase Beach on race day. These were then supplemented by 36 shorter, self-completion versions of the visitor survey, completed by visitors to the Events Square Information Point, the National Maritime Museum and the Gyllyngvase Beach cafe on race day. The decision was taken to analyse the full length and self-completion versions of the visitor survey together but we are confident that they are comparable as they used the same questions.

1.2.2 Business survey

Overall, 751 businesses in Falmouth, wider Carrick and across Cornwall were contacted to participate via telephone, email or post. The sample was stratified into accommodation providers, tourism and hospitality¹, retail and marine businesses so that the varying experiences of the sectors most likely to have been impacted upon could be examined.

A questionnaire and explanatory letter were sent to the postal and e-survey samples a week after the end of the Regatta to request their participation. Electronic versions were sent out to 90 Falmouth accommodation providers, 100 accommodation providers outside Carrick (via Visit Cornwall) and 270 marine businesses (via the Cornwall Marine Network). Postal versions were sent out to 95 accommodation providers without email addresses in Truro, Roseland and the wider Carrick district. Categories with a low response rate a week after the survey had launched were also telephoned to boost participation.

The telephone survey of Falmouth retail and hospitality businesses was conducted during the two-week period following the Regatta. This was the primary method of data collection for the business survey and over 200 local businesses were contacted via the local business directories. As previously mentioned, the telephone survey was also utilised to boost low e-response rates achieved from Falmouth accommodation providers and marine businesses.

By the data cut-off point at the end of September 2008, a total of 210 completed business surveys had been achieved (the full breakdown can be seen in Table 1.1 below). Of these, 136 surveys were achieved by telephone, 46 by post and a further 28 by email. The findings of the business survey provide a robust picture of the impact of the Tall Ships Regatta on local businesses.

Table 1.1: Breakdown of business survey responses

Business type	Contacted	Telephone	E-Survey	Postal	Total	Response rate
Marine	270	16	14	-	30	11%
Accommodation						
- Falmouth	90	35	9	2	46	51%
- Wider Carrick	95	-	5	20	25	26%
- Outside Carrick	100	-	-	24	24	24%
Tourism & Hospitality	82	42	-	-	42	51%
Retail	110	39	-	-	39	35%
Other (Taxi firms)	4	4	-	-	4	100%
Totals:	751	136	28	46	210	28%

The low marine business response rate appeared to be due to the fact that those businesses outside of Falmouth and that had no direct contact with the event, felt that the survey was irrelevant. This

¹ For the purpose of this study, 'Tourism and Hospitality' businesses were deemed to be visitor attractions and hospitality venues such as bars and restaurants.

was the most common response received from marine businesses that declined to complete the survey over the telephone.

This sentiment can be further substantiated by the localities of the marine businesses to complete the business survey. In total, nine tenths (27 of 30) of marine respondents were from the Carrick district. More specifically, just under two thirds of all respondents (63%, 19 of 30) were from the town of Falmouth itself. Consequently, the breakdown of marine business survey responses in Table 2 highlights some significant findings to be noted. When looking at the total number of identified Falmouth and wider Carrick-based marine businesses in comparison to those outside the Carrick district, the marine response rates are boosted to a more respectable level as can be seen in table 1.2 below.

Table 1.2: Breakdown of marine business survey responses

Business type	Contacted ²	Telephone	E-Survey	Postal	Total	Response rate
Marine						
- Falmouth	79	11	8	-	19	24%
- Wider Carrick	57	4	4	-	8	14%
- Outside Carrick	117	-	3	-	3	3%
Totals:	253	15	15	-	30	12%

If the figure for the total number of identified Falmouth and wider Carrick-based marine businesses is utilised (136) to calculate the response rate for all respondents except the 3 identified as being from outside Carrick, the marine response rate rises to a more respectable **20%**, or one fifth of all businesses in the district.

1.2.3 Visitor count

The research programme also included a visitor count exercise, which was completed by Carrick District Council volunteers across three of the main Tall Ships Regatta sites (The Docks, Church Street Car Park and Events Square) in order to ascertain visitor numbers for the event.

(See Appendix 1 for further details of the primary research tools used to conduct this study).

1.2.4 Secondary data review

In support of the primary data collection, this report also draws on estimates of visitor and traffic volumes from the National Maritime Museum, Ponsharden Park and Float / Park and Ride, Events Square evening entertainment ticket sales, and First Great Western. Further to this, a comparative literature review of other recent Tall Ships events was also conducted to help contextualise the study findings (see Appendix 2).

² NB: Figures for the total number of businesses contacted were obtained from a count of the businesses listed in the Cornwall Marine Guide and Directory 2008 (Cornwall Marine Network).

1.3 This report

This report presents the findings of the impact and evaluation study as outlined above. Chapter 2 describes the 'boundaries' of the work, in terms of the coverage of the evaluation. Chapters 3, 4, 5 and 6 contain the detailed findings linked to the volume and value of trips, visit patterns and trends, visitor profiles and the impact of the event on businesses. Based on the findings, Chapter 7 summarises the significant findings and sets out the concluding comments from the evaluation for Carrick District Council. Finally, Appendix 1 provides further details of the primary research conducted as part of this study and Appendix 2 sets out background information, reviewing the impact of Tall Ships Festivals on other cities, regions and countries.

2. Economic Impact Assessment Boundaries

In assessing the findings presented in the following sections, it is important to note the following points:

- Study coverage;
- Study method; and
- Comparisons between the 2008 Regatta and other similar events.

2.1 Study coverage

This study focuses on the *direct* impacts of the Funchal 500 Tall Ships Regatta. *Indirect* and *induced* impacts to the economy, such as increased purchasing by suppliers and visits to the area at a later date by event visitors who were consequently inspired to revisit, would require more in-depth analysis than was conducted for this study. It is important to note that these indirect and induced impacts are likely to be substantial for Falmouth and the surrounding area.

2.2 Study method

The outcomes of this study rely on the visitor count data obtained from the count conducted by volunteers for Carrick District Council and from secondary sources such as the Ponsharden Park and Ride / Park and Float facility, the National Maritime Museum and the Events Square evening entertainment organisers.

It is therefore important to note that whilst every effort has been made to ascertain the validity of the findings presented in this report, Step Ahead Research cannot accept liability for the visitor count and traffic flow data utilised. This is especially pertinent as differing sets of visitor numbers were published in the press for each day of the event to the figures provided to them by Carrick District Council from their count.

2.3 Comparisons between 2008 Regatta and other similar events

The findings of the 2008 event were compared with the Tall Ships Festival held in Falmouth in 1998 as this event had provided a benchmark for 2008 organisers. It should be noted that whilst there are some similarities between the two events, there are also some notable differences. The 1998 event was much larger than the 2008 Regatta; there were circa 100 Tall Ships at the '98 event compared with just 18 in 2008 as the former event was the official Tall Ships Race for that year rather than a smaller associated Regatta as took place this year. In '98, the last two days of the festival were held over the weekend, whereas the 2008 Regatta took place from Wednesday through to Saturday.

Moreover, the 1998 event took place in July whilst the 2008 Regatta was held in mid September, just after the start of the new school term, when visitor numbers in Cornwall have typically reduced

somewhat. Finally, the weather during the 1998 event was overcast and windy but dry, which it could be argued would have boosted visitor numbers. The 2008 event saw wind and heavy rain for every day except race day on Saturday, which would undoubtedly have had an impact on visitor numbers over the first three days.

With all of the above issues in mind, the following chapters detail the study findings in terms of volume and value of trips, visit patterns and trends, visitor profiles and the impact of the 2008 event on businesses.

3. Volume and Value of Trips

This chapter evaluates the volume and value of trips made to the Funchal 500 Tall Ships Regatta 2008. It draws upon the findings from the visitor survey and count exercise to present a detailed assessment of:

- Visitor numbers;
- Visitor expenditure;
- Additional trips to Falmouth and wider Cornwall; and
- Attitudes towards the event.

3.1 Visitor numbers

For the purpose of this study several terms are used to describe what is being measured:

- Site visitors – people who have entered any of the defined event sites where specific event activities were taking place;
- Spectators – people who watched a planned event activity (i.e. the race departure), but who did not enter any of the specified sites;
- Staying visitors – people who have visited one or more of the event sites and who are on trips staying away from home for at least one night; and
- Day visitors – people who have visited one or more of the event sites and who are on day trips from home, where there is no overnight stay involved.

The following sub-section on visitor numbers details the total number of visitors recorded via the Step Ahead / Carrick District Council count programme, as well as a comparison with the visitor numbers recorded in the press. The findings related to event site visits are then presented.

3.1.1 Visitor numbers recorded

A count programme was undertaken by Carrick District Council over each of the four days of the event across three of the main event sites; The Docks, Events Square and Church Street Car Park. Volunteers were stationed at each of the entry points to the event sites and counted pedestrian flows for a period of 10 minutes in every half an hour between the hours of 10am and 7pm on each day. On Thursday and Friday of the event, counting continued through to 9.30pm.

In addition to the observed counts, absolute visitor numbers were provided for each day relating to the Docks Gangway (pedestrian ferry) and Docks Coaches, as well as Events Square evening ticket sales, National Maritime Museum visitor numbers, Ponsharden Park / Float & Ride, First Great Western passenger numbers and the total number of competitors and officials present. It was envisaged that this data would help to provide more of a complete picture of visitor flow and numbers as anticipated within the Transportation Plan³. Recorded visitor flow across the days for the Docks and Church Street Car Park event sites is illustrated in Figures 3.1 and 3.2 below.

³ Transportation Plan: Funchal 500 Tall Ships Regatta 2008. August 2008. Carrick District Council.

Figure 3.1: Visitor flow at the Docks event site

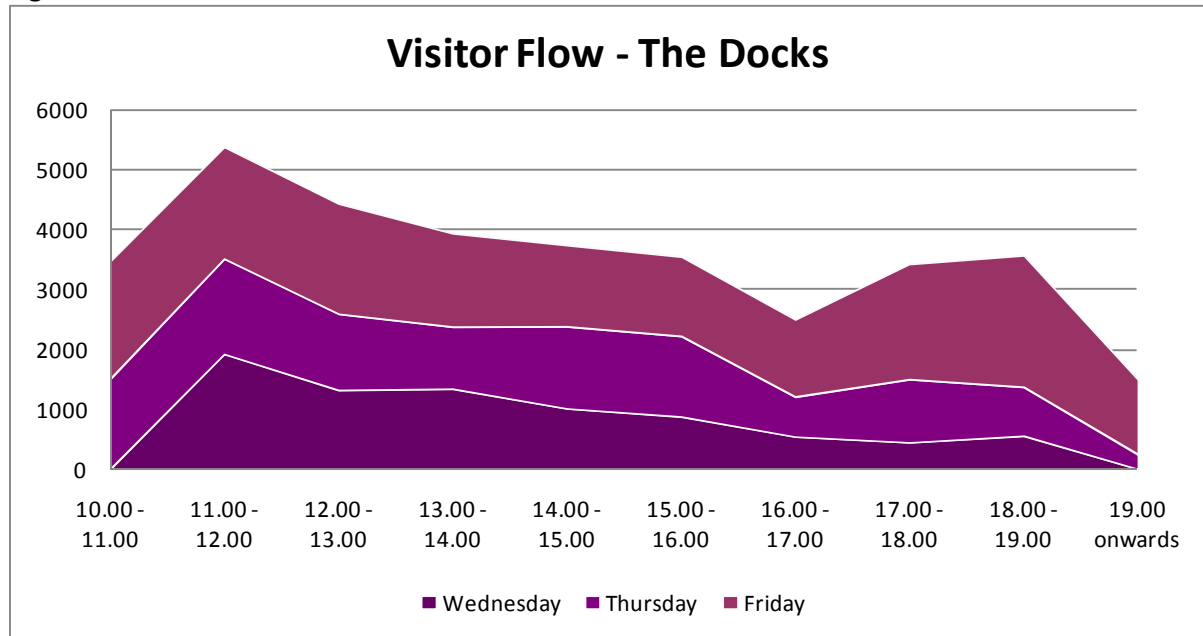
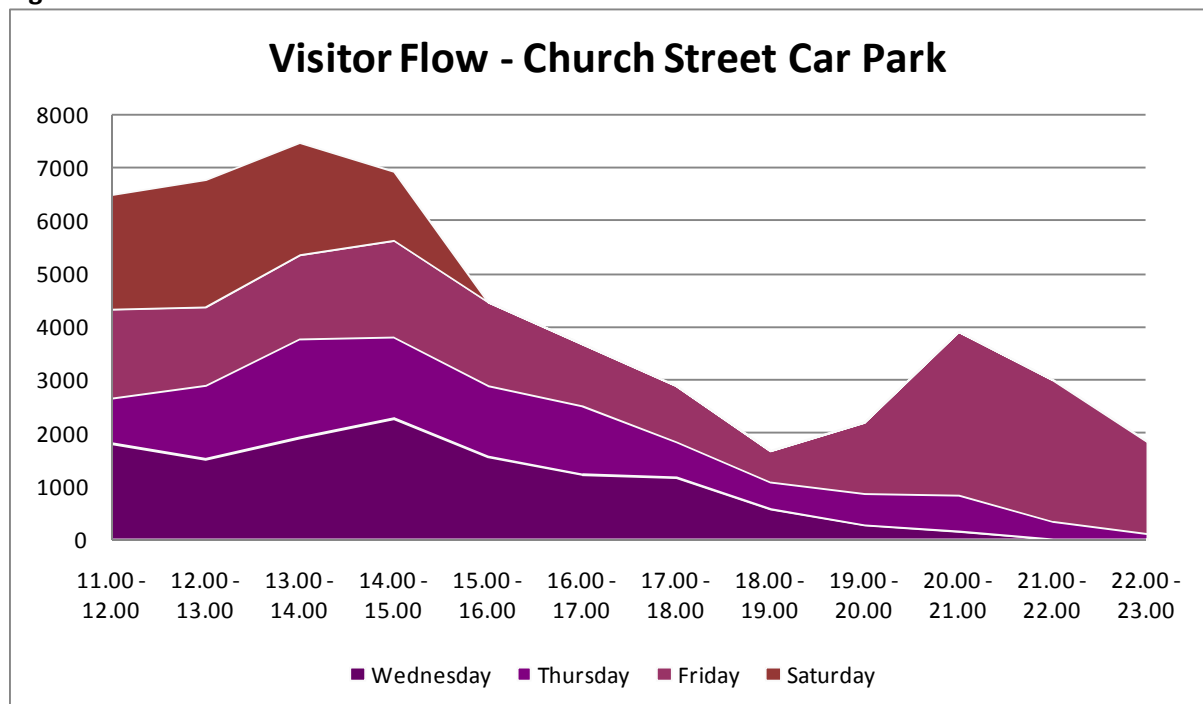


Figure 3.2: Visitor flow at the Church Street Car Park event site



As can be seen from the Figures above, on the Thursday and Friday of the event both sites follow a similar pattern whereby flow peaks around lunchtime and trails off throughout the afternoon into evening. On Friday, both sites saw a peak in late afternoon going into evening. At the Docks, this is likely to reflect a surge in last-chance visits to see the ships before the Docks closed ahead of the race. At Church Street Car Park this surge peaked at around 9pm, which is likely to reflect visits especially for fireworks.

Spectators for the Parade of Sail and start of the race on Saturday have been estimated and adjusted from the numbers published by the Police, of 130,000. This suggests that the 2008 event, which was much smaller than the 1998 Tall Ships festival, achieved the same number of visitors on Race Day.

Fine weather and the fact that the Parade of Sail happened on the weekend would undoubtedly have attracted a higher proportion of visitors than the 35% of 1998 figures recorded for site visits across each 2008 event day. This is substantiated by the spend figures identified through the Visitor Survey, which reveal the spend for both day and staying visitors on the Saturday was relatively high, potentially due to the higher number of people travelling further into Falmouth to see the event.

Nonetheless, it is unlikely that the 35% of '98 levels would suddenly rise to 100% of 1998 levels on the Race Day. Bearing all of this in mind, a figure of 50% of 1998 levels for Race Day was agreed, totalling 65,000 spectators for the start of the 2008 race. It should also be noted here that by taking the arguably conservative figure of 65,000 spectators on Race Day, the expenditure figures generated from the calculations in section 3.2 are therefore minimums. If the police figures of 130,000 are accepted then the £15million generated increases accordingly. Table 3.1a below highlights the total number of visitor days spent at the Tall Ships Regatta.

Table 3.1a: Number of Falmouth visitor days

SITE VISITORS	Wednesday	Thursday	Friday	Saturday	TOTAL
Observed site visitors	12,000	13,000	21,500	-	46,500
Spectators ⁴	-	-	-	65,000	65,000
Total visits per day	12,000	13,000	21,500	65,000	
Total number of visitor days					111,500

From Table 3.1a, it is important to note two key assumptions that have been made in order to calculate both the total visitor days and total number of visitors to the event in Table 3.1b:

1. As can be seen in section 3.1.2 below, respondents to the visitor survey visited an average of 3.3 event sites each. As the visitor count data held was only based on 3 event sites, it was therefore assumed that by taking the Docks visitor numbers (which were complete for each day), all visitors to this site would have also visited the other two sites for which data was held (Church Street Car Park and Events Square). This assumption was necessitated by the fact that the count data held for Church Street and Events Square was largely incomplete in comparison to the Docks.
2. When calculating the actual visitor numbers, it was found that by adding together the total site visits for each day (46,500) and dividing by the average number of days visited, taken from the visitor survey (1.97), the total number of site visitors between Wednesday and Friday was 23,604. As the total number of visitors on Saturday was recorded as 65,000, it was therefore assumed that 41,396 of this Saturday total were **new** visitors to the Regatta. It is important to note that this calculation is a bottom line estimate based on the **actual figures** that were obtained from the visitor count and survey. It is possible that the total number of visitors was actually higher.

Table 3.1b: Number of Falmouth visitors

Total number of visitor days		111,500
Average no of days visited (taken from visitor survey)		1.97
Total site visitors overall	$46,500 \div 1.97$	23,604
No of new visitors on Saturday	$65,000 - 23,604$	41,396
Total site and spectator visitors	$23,604 + 41,396$	65,000
Recorded competitors / officials		1,164
Total no of all visitors		66,164

³ Number of recorded spectators both onsite and on the headlands for Race Day (Saturday)

3.1.2 Event site visits

Event Sites Visited	%
Docks	70%
Entertainment Centre (Events Square)	63%
Custom House Quay	47%
Shopping Village (Church Street Car Park)	43%
The Moor	27%
Skinnners Bar (Church Street Car Park)	25%
National Maritime Museum	15%
Gyllyngvase Beach	12%
Pendennis Point	10%
Other sites (i.e. St Anthony's Head)	8%
Pendennis Castle	7%
The Poly	6%
Base = 423 respondents	

In total, only 3% of all 436 respondents surveyed were found to be spectator visitors, that is, they were enjoying the festival but had not visited any of the specified event sites. Nonetheless, this was due to the fact that visitors were primarily sampled at the specified event sites, except for those visitors surveyed on race day around the town and at Gyllyngvase Beach⁵. Of the 423 site visitors, on average, they had either visited or intended to visit 3.3 event sites per day.

As expected, the Docks and Events Square were the most frequently visited event sites for the Tall Ships Regatta, receiving 70% and 63% of all

visitors surveyed. This is likely to be because they were the main hubs of the planned event activities and were closest together in terms of distance.

The other two main event sites (with scheduled activities taking place) were 3rd and 4th most frequently visited, with nearly half of all visitors in each case going to the two venues (Custom House Quay and Church Street Car Park respectively).

Perhaps surprisingly, only just over one quarter of all visitors surveyed had, or planned to visit the Moor. This figure is fairly modest considering it was one of the highlighted event sites on the visitor map available from the Tourist Information Centres (TICs) and other tourist focal points. It is possible that low pedestrian flow to the Moor could be linked to the complaint raised by some local businesses in that part of Falmouth, which centred on a reduction in business due to the lack of signage directing visitors from the main event sites at the opposite end of Falmouth to the Moor. This is further corroborated by the finding that of the 119 respondents surveyed who had visited the Moor, around one half were from Cornwall and more specifically, 39% were from the Falmouth area. This would suggest that most visitors surveyed, unless local, were unaware that the Moor was there.

3.2 Visitor expenditure

In order to determine the economic impact of the Funchal 500 Tall Ships Festival to the economy of Falmouth and the surrounding area it is important to calculate the visitor spend, taking into account the differing characteristics of day and staying visitors. The most notable difference between the two is that whilst both incur a daily spend, for staying visitors, trip length and accommodation must also be taken into account.

Further to this, the overall proportion of day and staying visitors used for calculations was decided by reviewing the visitor survey splits across each day of the event. The proportion of staying visitors was marginally higher than day visitors on both the Wednesday and Thursday on the event at 53% and 54% respectively. The number of interviews achieved on these two days also broadly reflects the

⁵ It is a recommendation that provision needs to be made in future survey sampling frames for a larger number of spectator visitors in comparison to site visitors to obtain an accurate reflection of event visitors.

differences in visitor numbers on these days and the fact that the event opened later on the first day (Wednesday). Similarly, there was only a marginal difference in proportions of day and staying visitors on Saturday, although in this case, the slight majority was in favour of day visitors, with 52% of total visitors interviewed. The notable exception was Friday, whereby almost two thirds of visitors interviewed were identified as being day visitors. However, it could be argued that several factors fed into this:

1. The visitor survey was conducted broadly between the hours of 10am and 6pm on the Wednesday, Thursday and Saturday of the event;
2. On Friday, due to the Firework display, the visitor survey was conducted between 10am and 10pm to capture people travelling in for the Display;
3. As the survey period was extended to 10pm, Friday's sample will have undoubtedly captured local residents who had visited the event after work both to enjoy the live music, atmosphere, and to watch the Firework display. This is supported by the survey finding that well over a quarter of all day visitors on Friday (29%) mentioned beer, entertainment, music, food & drink or fireworks as their primary reason for visiting compared with just one fifth of staying visitors on the same day (21%). Furthermore, more than two thirds (68%) of visitors surveyed between 6pm and 10pm were day visitors.

These unique characteristics associated with the sample of visitors surveyed on the Friday of the event would suggest that it is plausible to accept the overall day and staying visitor split of the 436 survey respondents, which reflects the splits identified for the Wednesday, Thursday and Saturday of the event. Thus for calculations, overall proportions of days visitors were accepted as 55% for day visitors (45,706) and 45% for staying visitors (37,396).

Unlike the 1998 Tall Ships event⁶ where travel represented the highest spend for day visitors (£13), eating and drinking presented the biggest spend for day visitors at the 2008 event, with each group spending on average £26. This was followed by travel at over £14. Day visitors spent little compared to staying visitors on entertainment, clothes, or other shopping and their overall group spend total was £50.31. Since there were between 2 to 3 people in the average group, this represents spend by each person on the trip of £19, which is considerably more than the spend per person recorded for day visitors in 1998 of £11.

Again, eating and drinking was most significant for staying visitors, which is comparable with the 1998 event. However in 1998, group spend on eating and drinking totalled £18 and in 2008 this almost doubled to £35. In 1998 and 2008, travel was the second largest spend equating to £10 and £23 respectively. Comparing the 2008 day and staying visitor daily expenditure, staying visitors spent considerably more on shopping for clothes and other items such as souvenirs and gifts, taking their total daily spend per group to almost £82. This is almost double the total daily spend for staying visitors recorded in 1998 of just under £50. With an average of almost 7 nights per trip and between 2 to 3 people per group, this makes the spend per staying visitor £233. The cost of accommodation must also be added to this. Per group, the average spend on accommodation was £371, or around £155 per person. By adding the accommodation and non-accommodation elements together, each staying visitor was found to spend £388 per trip.

By multiplying these results by the number of day and staying visitors identified, this indicates that £0.7million of direct expenditure was generated by day visitors and £11.5million by staying visitors, or just over £12million overall for the local economy. Whilst the total direct expenditure generated

⁶ Tourism Associates. Falmouth Tall Ships Festival 1998: Economic Impact and Evaluation.

in 2008 is lower than the £24million calculated in 1998, this is due to the smaller scale and therefore fewer visitors to the 2008 event in comparison. Table 3.2 presents the expenditure findings.

Table 3.2: Day and staying visitor expenditure

PROPORTION OF VISITOR TOTAL		Day visitors	Staying visitors
Event Day	Respondents Interviewed		
Wed 10 th	47	47%	53%
Thurs 11 th	104	46%	54%
Fri 12 th	181	61%	39%
Sat 13 th	104	52%	48%
Overall proportions of visitors		55%	45%
No. of visitors		36,390	29,774
AVERAGE TOTAL DAILY EXPENDITURE			
		Day visitors	Staying visitors
Travel		£14.41	£23.37
Eating & drinking		£25.55	£35.19
Entertainment		£2.11	£2.60
Buying clothes		£2.94	£8.01
Other shopping / spending		£5.30	£12.66
Total daily spend per group		£50.31	£81.83
AVERAGE TOTAL TRIP EXPENDITURE			
		Day Visitors	Staying Visitors
Total daily spend as above (per group)		£50.31	£81.83
Average days visited or stay		1	6.8
No. of people in group		2.62	2.39
Total spend per person (excl. accommodation)		£19.20	£232.82
Total accommodation per group		-	£370.92
Total accommodation per person		-	£155.20
Total trip spend per person		£19.20	£388.02
TOTAL EXPENDITURE			
		Day Visitors	Staying Visitors
No. of visitors		36,390	29,774
Total trip spend per visitor		£19.20	£388.02
TOTAL SPEND BY ALL VISITORS		£698,688	£11,552,907

Average daily expenditure per person amongst visitors to the Funchall 500 Tall Ships Regatta was broadly in line with the expenditure of visitors to Cornwall in general⁷. Patterns for visitors to the 2008 Regatta and to Cornwall generally indicate that spend was highest in both cases in terms of accommodation, eating and drinking and shopping but lowest in terms of entertainment. One marked difference between the findings of the two studies was the significantly larger spend on travel noted for visitors to the Funchall 500 Tall Ships Regatta in comparison to Cornwall visitors generally (just £3.20 on average).

⁷ Comparisons drawn between the 2008 Tall Ships Regatta Visitor Survey and Cornwall Visitor Survey 06/07.

3.3 Additional trips to Falmouth and Cornwall

Not all of the £12million of direct expenditure identified can be attributed to the presence of the Funchal 500 Tall Ships Regatta. However, some will have been generated by entirely additional trips to Falmouth and indeed Cornwall that would not have happened if the Regatta had not taken place. As reported in Section 4.2.1, only just over one third (37%) of all staying visitors who said that the Regatta was the main purpose of their stay (29 out of 78) would have visited Cornwall at a different time this year. Moreover, almost a quarter of these (24%) would have not have stayed in Falmouth, but in a different part of Cornwall.

Perhaps most importantly, the visitor survey indicated that 50% of staying visitors and 54% of day visitors would not have visited Falmouth in the week of the 10th to 13th September had it not been for the Regatta. As can be seen in table 3.3 below, this equates to a total of over £6million that arguably would otherwise have not been spent.

Table 3.3: Expenditure generated by additional trips

TOTAL EXPENDITURE	Day Visitors	Staying Visitors
No. of visitors	36,390	29,774
% who would not have visited without event	54%	50%
No who would not have visited without event	19,651	14,887
Total trip spend per visitor	£19.20	£388.02
TOTAL SPEND BY ALL VISITORS	£377,299	£5,776,454

3.4 Attitudes towards the event

This sub-section discusses the attitudes towards the event identified by both event visitors and local businesses to highlight key areas of satisfaction as well as well as suggested improvements or areas of dissatisfaction.

3.4.1 Visitors

Areas of satisfaction
<ul style="list-style-type: none"> • Tall Ships: <ul style="list-style-type: none"> ➢ Mexican ship and Parade of Sail; ➢ Board the ships and crew hospitality. • Atmosphere of the festival; <ul style="list-style-type: none"> ➢ Friendly local people; ➢ A unique experience. • Entertainment at event sites: <ul style="list-style-type: none"> ➢ Live music in Church Street Car Park and Custom House Quay; ➢ The fireworks; ➢ Younger visitors enjoyed attractions such as the bouncy castle; ➢ Free entry. • Skinners beer tents, which were situated at different event sites.

The overwhelming response from visitors was that they were enjoying their trip to the Regatta. In total (415 out of 436) 95% were pleased with the festival whilst only 2% (9 out of 436) were not.

According to the visitors there were several reasons that the festival was so well received. There was consensus that the event was a *'wonderful experience and [so] well organised'*.

Ultimately visitors were very positive and enjoyed the festival for a variety of reasons, which may be seen to tally with the variety of visitor profiles. For example visitors who had

younger children mentioned attractions such as the bouncy castle; Tall Ship enthusiasts mentioned the ships and the younger generation appreciated other aspects: “Beer, boats, ladies, pasties”!

The minority of visitors (2%) who did not enjoy the festival were often influenced by variables beyond the organiser’s control such as the weather conditions. They also felt that due to the influx of people in Falmouth the infrastructure, such as parking and transport (including trains) was put under strain. Finally, as of the second festival day, dogs were not allowed onto the Docks and some visitors had not heard the radio reports or viewed the website in time to find this out. It was also mentioned by visitors, especially those with disabilities, that they had difficulty reaching the Docks because of the distance between the Docks and the centre of town.

3.4.2 Businesses

Overall, it was felt by the majority of the 210 businesses surveyed that the Falmouth Tall Ships Regatta had been a resounding success. One business owner commented:

“Congratulations to all involved in planning and implementing this major event - without their hard work it would not have been the success it was.”

In terms of the impact of the Regatta on the economy of Falmouth, over half (52%) thought it had had a very positive impact and a further third that it had had a fairly positive impact (31%). In contrast, only one business felt that the Regatta had had a fairly negative impact on Falmouth.

Achievements noted by local businesses

- **Increased sales:**
 - Both during event & following weeks
- **Good publicity for Falmouth & the surrounding area**
- **Demand for local accommodation outstripped supply:**
 - Falmouth was fully booked.
 - Many Falmouth providers could have filled their rooms 10 times over.
 - Consequentially, accommodation providers in the surrounding areas saw an increase in business.

The results were similar when businesses were asked for their opinion of the Regatta’s impact on the image of Falmouth. Almost two thirds (61%) felt that it had had a very positive impact whilst almost a third (31%) felt that it had had a fairly positive impact. None felt that the Regatta had had a negative impact on Falmouth’s image.

Improvements suggested by businesses

- **Access:**
 - More train services;
 - Increased bus services –direct route;
 - Cheaper parking facilities.
- **Advertising:**
 - Better signage for all event sites (i.e. The Moor) to re-direct visitor flow;
 - Increased advertising to wider geographical area (i.e. national audience).
- **Increased organiser / private sector communication & collaboration:**
 - Increased communication about event activities to help co-ordinate opportunities i.e. late opening;
 - Opportunity for more local businesses to host stalls at event.

Whilst many positive achievements were identified by businesses, a minority did report some negative effects on their enterprise as a direct result of the Tall Ships Regatta. The most common reason for this sentiment was the lack of signage directing visitors as far as The Moor. One business explained:

“...not all businesses benefited from the Tall Ships... some, like me, probably lost revenue.”

Some suggestions were made for ways to improve the local events, in future as can be seen in the adjacent box. However, overall most businesses were confident that events like this are extremely beneficial for the local area. One enthusiastic business even added:

“It was a fantastic week and all of the customers were very cheerful. If people didn't make money then they must have been closed!”

3.4.3 Overall attitudinal findings

In general it seems that there was a great deal of support for the Funchal 500 Tall Ships Regatta from both its visitors and the businesses in Falmouth and the wider surrounding area, which is comparable with the ‘thumbs up’ reported after the 1998 Tall Ships event.⁸ Overall, visitors were impressed with the ships, the atmosphere, entertainment and hospitality provided, whilst businesses increased sales and saw increased demand as a result of the event. Perhaps as expected, some visitors and businesses felt that improvements needed to be made to access (i.e. increased bus/train services and cheaper parking), however this is a common issue raised at many similar events as discussed in Appendix 2, section A2.3 and is not easily addressed.

Businesses raised a key issue around the need to improve signage for future events in the town to re-direct pedestrian flow to areas with lower visitation at the 2008 event such as The Moor. Further to this, they also expressed a desire to collaborate and communicate with event organisers more for future events in order to maximise on business opportunities, which some businesses felt were missed this time around. Some also hoped to see increased advertising for future events to more readily reach a national audience.

With all of this in mind, visitors and businesses alike were in agreement that the event provided good publicity for Falmouth and Cornwall that would undoubtedly bring longer-term benefits for the local area.

⁸ Tourism Associates. Falmouth Tall Ships Festival 1998: Economic Impact and Evaluation.

4. Visit Patterns and Trends

This chapter presents an assessment of the visit patterns and trends associated with the Tall Ships Regatta identified from the visitor survey. It provides a detailed appraisal of:

- Visit characteristics (including information, visit patterns, transport, and length of stay);
- Holiday trips (including holiday type, accommodation booking patterns, location of stay and past/future holiday patterns); and
- Visits to other locations, attractions and events.

4.1 Visit characteristics

This section about visitor characteristics discusses the survey findings linked to the ways in which visitors found out about the event, patterns of visiting, transport and length of stay.

4.1.1 Information

Day		Staying	
Info source	%	Info source	%
Word of mouth	39%	Word of mouth	35%
Internet	2%	Internet	10%
Newspaper	23%	Newspaper	12%
Radio	4%	Radio	2%
Another event	2%	Another event	2%
Magazine	1%	Magazine	3%
Television	6%	Television	8%
Leaflet	5%	Leaflet	17%
By chance	5%	By chance	10%
Work	1%	Work	0
Live here	10%	Live here	1%
Cruise	0	Cruise	1%
Base = 203		Base = 172	

The largest number of all visitors surveyed (32% of 436) had found out about the Tall Ships Regatta through word of mouth. The next most important was newspapers (15%), followed by a leaflet or programme (9%), by chance or television (6% each), and via the Internet or because they were local residents (5% each). All other options had a minimal impact overall. These findings are broadly in line with those identified in 1998 after the last Tall Ships event.⁹

When the findings are split according to day and staying visitors (as can be seen in the box on the left), word of mouth was still the most common source of information about the event. However, there were some key

differences according to the visitor type. Day visitors were most likely to have learnt about the event either through word of mouth (39%), the newspapers (23%) or simply because they live locally and were already aware of it (10%). Staying visitor information sources were more varied suggesting that they were purposefully researching the Regatta; they had mostly learnt about the event by word of mouth (35%), leaflet (17%), the newspapers (12%), the Internet (10%) and television (8%). Further to this, one in ten staying visitors had learnt about the event by chance (10%) as they had been staying in the area anyway.

⁹ Tourism Associates. Falmouth Tall Ships Festival 1998: Economic Impact and Evaluation.

4.1.2 Pattern of visiting

The Tall Ships Regatta was shown to positively impact the numbers of people visiting Falmouth. Over half of the 436 people surveyed (228, 52%) said they would not have visited Falmouth that day had the Regatta not been taking place. More specifically, day visitors accounted for 54% of those who would not have visited and staying visitors, 50%. These findings (although slightly lower) reflect the day and visitor splits based on the 1998 event. It is recognised that the totals for those staying visitors who would not have otherwise visited, will include holidaymakers who are staying in Falmouth and so would have considered themselves to have been 'visiting' the Regatta location anyway. This issue was also reported upon for the 1998 event.

Respondents visited the event an average of 1.97 days each. The majority (250 out of 436, 57%) expected to visit the regatta on more than one day of the festival, with only 36% not intending to return. Race Day on Saturday was the day that most people, 50%, were visiting or intended to re-visit followed closely by Friday with 49% of people. Wednesday and Thursday received fewer visitors with 25% and 34% respectively.

Almost three quarters (72%) of all visitors felt that the Tall Ships Regatta was entirely sufficient for occupying the full trip as they had not or were not planning to visit any other events of attractions whilst they were there.

4.1.3 Transport

Almost half of all 436 visitors (46%) travelled to the Regatta by car, whilst (95 out of 436) 22%, walked into Falmouth. Of these, day visitors were less likely to use their car (47%) and more likely to walk (32%) than staying visitors (57% and 20% respectively). This would seemingly reflect the higher proportion of local visitors who were close enough not to need to travel by car. Moreover, a much lesser proportion of visitors reached the event by train or bus (6% each), or boat/ferry (5%).

Unlike the 1998 event, the Park and Ride / Park and Float was only utilised by 1% of the total compared with 33% in 1998¹⁰. This was predominantly because the decision was made by the organisers not to provide an out-of-town park and ride service for 2008 as had been done in 1998. Due to the high volume of visitor numbers expected for the 1998 event, a park and ride service exclusive to the event was offered yet it resulted in a financial loss for the event organisers. As the anticipated numbers for 2008 were much lower due to the smaller scale of the event, it was felt that an exclusive park and ride service was not viable. Instead, the small existing provision at Ponsharden was utilised to capacity.

4.1.4 Length of stay

The amount of time that visitors spent at the regatta was extremely varied, although most people expected to spend at least half of their day there. The breakdown was as follows:

- 1 to 3 hours: (71 out of 436) 16%
- 3.5 to 5 hours: (97 out of 436) 22%
- 5.5 to 7 hours: (79 out of 436) 18%
- 8 to 10 hours: (103 out of 436) 24%
- 11 to 12 hours: (16 out of 436) 4%

¹⁰ Tourism Associates. Falmouth Tall Ships Festival 1998: Economic Impact and Evaluation.

The average length of stay for all visitors surveyed was 6.1 hours and a shade over for staying visitors (6.3) but a shade under for day visitors (6). Compared with 1998, visitors appeared to stay for an hour less on average in 2008, however, the findings still indicate that the Funchal 500 Tall Ships Regatta was a full-day rather than a half-day event.

4.2 Holiday trips

The split between day and staying visitors was small; a total of (198 out of 436) 45% were staying away from home and 55% were day trippers (238). Reflecting the findings of the 2005 Falmouth Visitor Survey¹¹, the majority of visitors to the resort were classified as day visitors. However, the gap between the two visitor types has apparently closed somewhat and whereas in 2005, staying visitors only accounted for 38% of all visitors to the two, this figure increased to 45% in 2008.

This section focuses on the holiday trips taken by all staying visitors surveyed. It discusses type of trip, accommodation booking patterns, location of stay and past and future holidays.

4.2.1 Type of trip

Of the 198 staying visitors, 34% considered their stay to be a short break, whilst 29% considered it to be an additional holiday. One fifth (20%) were on their main holiday of 2008, which was lower than the 1998, possibly due to the smaller scale of the recent event and the fact that it was held after the new school term had started rather than in July.

In total, 39% of all staying visitors said that the Tall Ships Regatta was the main purpose of their stay, whilst 31% said that it was not. Of the 56 staying visitors who said that the Regatta was not the main purpose of their trip, nine in ten would still have visited Cornwall in 2008 if the Regatta had not taken place. However, only just over one third (37%) of those who said that the Regatta was the main purpose of their stay (29 out of 78) would have come at a different time of year. Moreover, almost a quarter of these (24%) would have stayed in a different part of Cornwall.

When disaggregating the type of holiday by whether the main purpose of trip was to visit the Regatta, this was indeed the case for over half of all respondents who considered their trip to be either their main or an additional holiday (51% of 39 and 52% of 58 respectively). In addition to this, one third (32%) of 68 holidaymakers on a short break cited the Regatta as the main purpose of their trip. Only 1% of all staying visitors were on a non-leisure related trip.

The average length of holiday for the staying visitors surveyed was 6.8 days (highly comparable to findings for visitors to Cornwall¹²), with over two thirds of respondents taking relatively short breaks, staying for between 1 and 7 days.

Length of stay	%
1 to 4 days	35%
5 to 7 days	37%
8 to 10 days	9%
11 to 14 days	9%
Over 14 days	3%
Base = 184 respondents	

The most popular choice of accommodation amongst all staying visitors surveyed was serviced accommodation, either in a hotel, guesthouse, B&B or farmhouse with 39% of respondents choosing this option. This was followed by the non-serviced accommodation in the form of caravans (touring or static) or chalets at (19%). These findings indicate a shift in accommodation patterns from the

¹¹ Falmouth Visitor Survey 2005: Final Report. South West Tourism Research Department, Jan 2006.

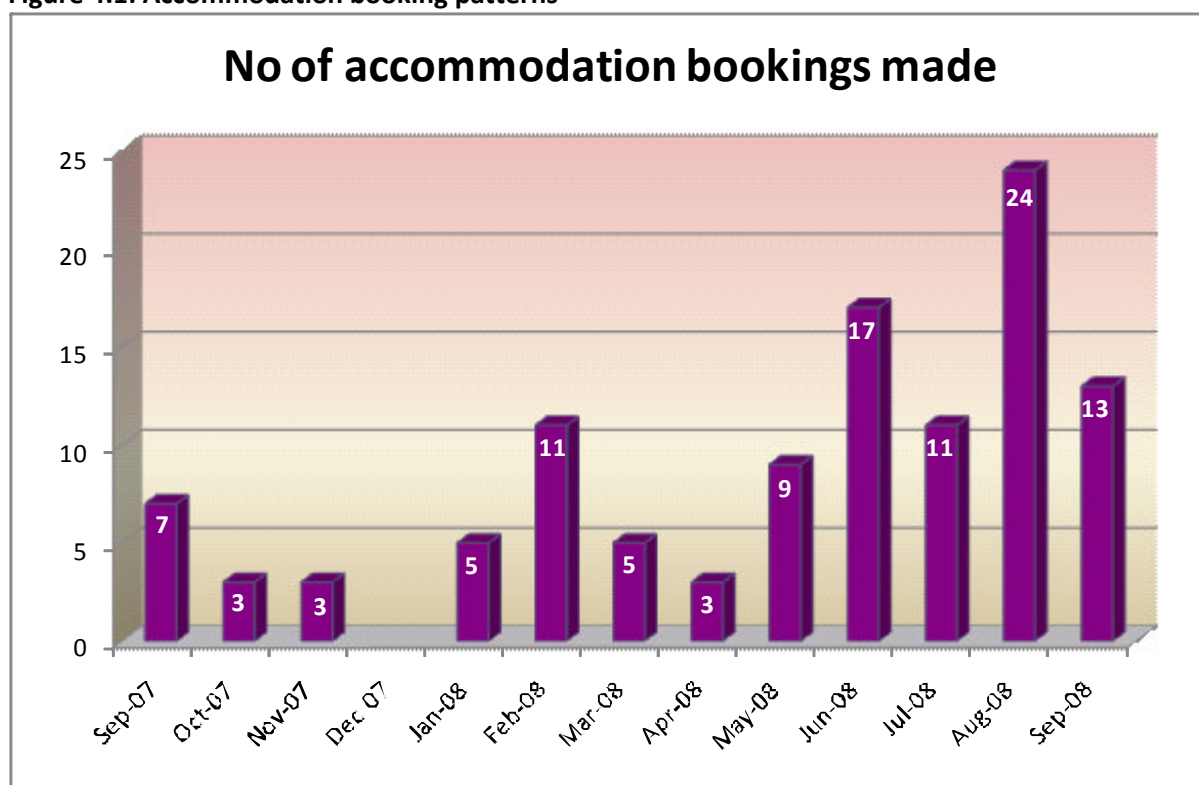
¹² Cornwall Visitor Survey 06/07. South West Tourism Research Department for Visit Cornwall. 2007.

1998 event where non-serviced accommodation was most prominent. In total, one quarter of all staying visitors (23%) were not spending any money on accommodation, either staying with friends or relatives, or in second homes or timeshares, which is comparable with the proportion cited as staying within the non-commercial sector in 1998 (largely VFR).

4.2.2 Accommodation booking patterns

Staying visitors were asked questions about their accommodation booking patterns which can be seen in figure 4.1 below. A low proportion of the 111 staying visitors to discuss booking patterns had booked their holiday a long way in advance in 2007 (12%). Equally, only 7% of all 198 staying visitors surveyed had just turned up and found accommodation without pre-booking. Booking lead times for staying visitors were fairly high with the vast majority of visitors booking accommodation at least one month in advance, which is in line with the 2007 findings for visitors to Cornwall¹³.

Figure 4.1: Accommodation booking patterns



Over half (61, 55%) of the 111 respondents had booked their accommodation within the first 7 months of 2008, of which June, July and February respectively were the most popular months. Nonetheless, exactly one third (37, 33%) had made late bookings in either August or September 2008. Moreover, August represents the highest number of bookings made by respondents interviewed (22% of bookings made overall).

4.2.3 Location of stay

Unsurprisingly, the majority of the staying visitors (over two thirds) were spending their holiday within the Falmouth, Truro and Roseland area (67%). The figure for holidaymakers staying locally has risen significantly when compared with the 1998 findings (43%). There could be several reasons for

¹³ Cornwall Visitor Survey 06/07. South West Tourism Research Department for Visit Cornwall. 2007.

this such as; overall visitor levels being higher in 1998, resulting in a lack of bed spaces in the local area to accommodate all visitors, and an increase in bed spaces available in the Falmouth area since the 1998 event.

4.2.4 Past and future holidays

The majority of respondents were found to be regular visitors and had stayed in Cornwall 10 or more times in the last 10 years (33%). The next largest group, (22%) had visited Cornwall 1 to 3 times in the last 10 years; whilst 17% had visited Cornwall 4 to 6 times in the last 10 years.

In total 78% of staying visitors surveyed intended to return to Cornwall on holiday in the future. More specifically, 19% of these intend to return every year and 18% intended to return next year. A further 36% said that they would definitely come back another time.

4.3 Visits to other locations, attractions and events

In total almost three quarters (72%) of all visitors only visited the Tall Ships Regatta sites during their trip to Falmouth suggesting that the event was viewed by most as sufficient for occupying the full trip, in line with the 1998 impact study findings. Some of these visited the Regatta-affiliated National Maritime Museum and Pendennis Castle during their trip (15% and 7% of all event sites visited respectively). Of the 28% who did visit other locations, attractions and events during their trip the most popular attraction visited outside of Falmouth itself was the Eden Project, followed by the National Trust properties and gardens around Cornwall. In terms of other locations visited, the most frequent were St. Ives, Newquay, Truro, the Lizard, Padstow, Penzance and St. Mawes.

When the proportion of staying visitors who didn't visit any other events or attractions during their trip to the event was broken down, findings indicated that day visitors were much more likely to find the Regatta sufficient entertainment for their whole trip (72%) quite possibly because they had purposefully visited Falmouth on that day for the event. Staying visitors were most likely to be combining their trip with visits to other attractions with 40% having planned to do so.

5.0 Visitor Profiles

This chapter discusses the profiles of the visitors who attended the Funchal 500 Tall Ships Regatta. It draws upon the research findings from the visitor survey to identify:

- Place of origin;
- Group size;
- Group age;
- Economic status and social class; and
- Attitudes towards the event (areas of satisfaction and factors spoiling enjoyment).

5.1 Place of origin

Overall, nearly all visitors to the Regatta were from the UK reflecting the findings for visitors to Cornwall in general¹⁴. Only 1% of visitors were from overseas and most of these were from Europe (France and Germany). Nonetheless, over two thirds of the 436 people surveyed (68%) were usually resident in the South West, which was significantly higher than the composition of visitors to Cornwall generally (just one quarter), and three quarters of these (75%) of these 295 came from Cornwall. This could reflect the fact that almost three quarters of all visitors surveyed for the 2008 Regatta (72%) had visited specifically for the event suggesting a high proportion of day visits and short breaks from nearby counties compared with general holiday patterns of visitors to Cornwall.

Analysis of the Cornish residents indicated that over one quarter (28%) of Cornish visitors were from Falmouth followed by a further 16% from wider Carrick, including Truro, the Roseland and surrounding areas. In terms of visitors from other South Western counties, 11% came from Devon and between two and four percent of the visitor base came from each of the other counties in the South West.

When place of origin is split between day and staying visitors, some interesting profiling information emerges. Nine in ten day visitors to the Regatta were from Cornwall and almost two thirds (60%, 127) of these came from the Carrick district. Examining the specific localities of this group of day visitors indicates that two thirds (65%) were from Falmouth itself, reflecting the high concentration from the Falmouth-Truro-Redruth triangle noted in 1998.¹⁵

In contrast, only one third of staying visitors (33%, 65 of 198) were from the southwest region and only 14% of these were from Cornwall. Over one third (34%) of staying visitors from the southwest were from Devon. Holidaymakers from outside the South West came largely from the South East (25%), London (13%), West (14%) and East Midlands (11%). The 1% of visitors from abroad came from Canada, France and Germany. The above findings related to place of origin largely mirror those of the 1998 study by Tourism Associates.

¹⁴ Cornwall Visitor Survey 2006 / 2007. South West Tourism Research Department for Visit Cornwall. 2007.

¹⁵ Tourism Associates. Falmouth Tall Ships Festival 1998: Economic Impact and Evaluation.

5.2 Demographic Variables

In order to gain a greater insight into the profiles of the people who visited the Regatta, this section discusses the findings related to group size, age alongside economic status and social class compared with 1998 as well as relevant annual tourist surveys for Falmouth and wider Cornwall.

5.2.1 Group Size

Av Group Size	2005	2008
All visitors	2.56	2.52
Day visitors	2.61	2.62
Staying visitors	2.48	2.39

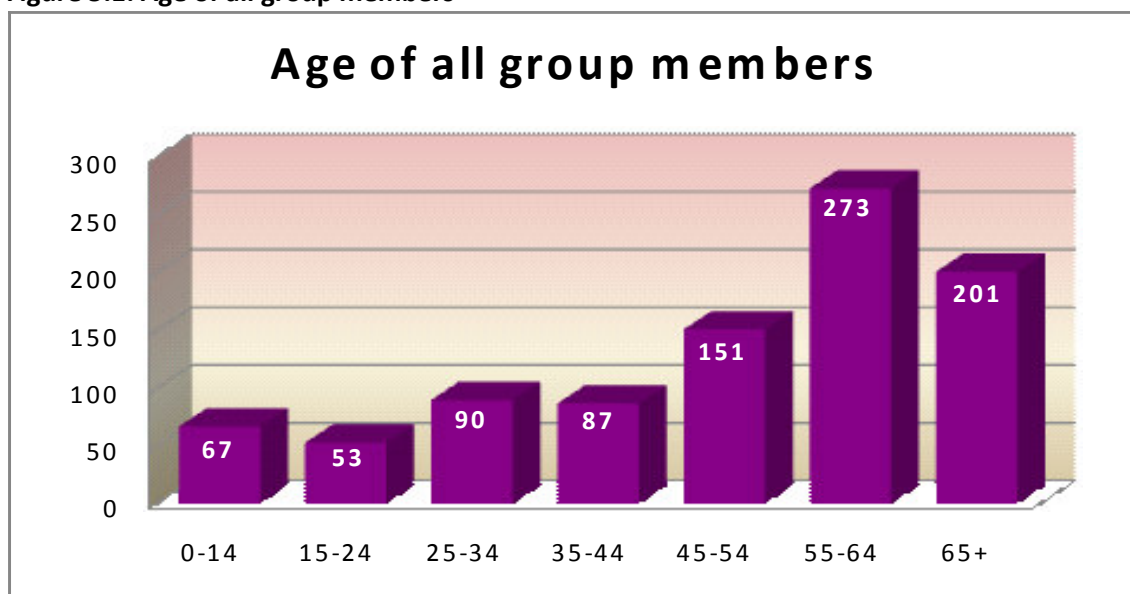
The adjacent box provides a comparison between the group compositions of visitors to the 2008 Tall Ships Regatta and visitors to Falmouth recorded in the 2005 Falmouth Visitor Survey¹⁶. The overall number of people in a group was extremely similar in both years with 2.52 in 2008 and 2.56 in 2005. Likewise, the compositions for day visitors in both years

were almost the same. However, there appears to have been a slight drop in the average number of people in a group of staying visitors to the 2008 Regatta in comparison to the 2005 visitor survey. However, this apparent decline is likely to be due to the fact that the Regatta was held in September after the school term had started, whereas the majority of the 2005 survey was conducted over the summer holiday period (24th July to 27th September), including a higher proportion of families within the 2005 sample.

5.2.2 Age of all group members

As can be seen in Figure 5.1, the event attracted a significantly older audience of visitors than would normally visit Falmouth, with over half of all group members aged 55+ (52%) in comparison to around one third (32%) identified within the Falmouth 2005 visitor survey. Moreover the Regatta attracted an older audience than the typical visitor to Cornwall whereby only 58% of all visitors identified¹⁷ were over 45 years old.

Figure 5.1: Age of all group members

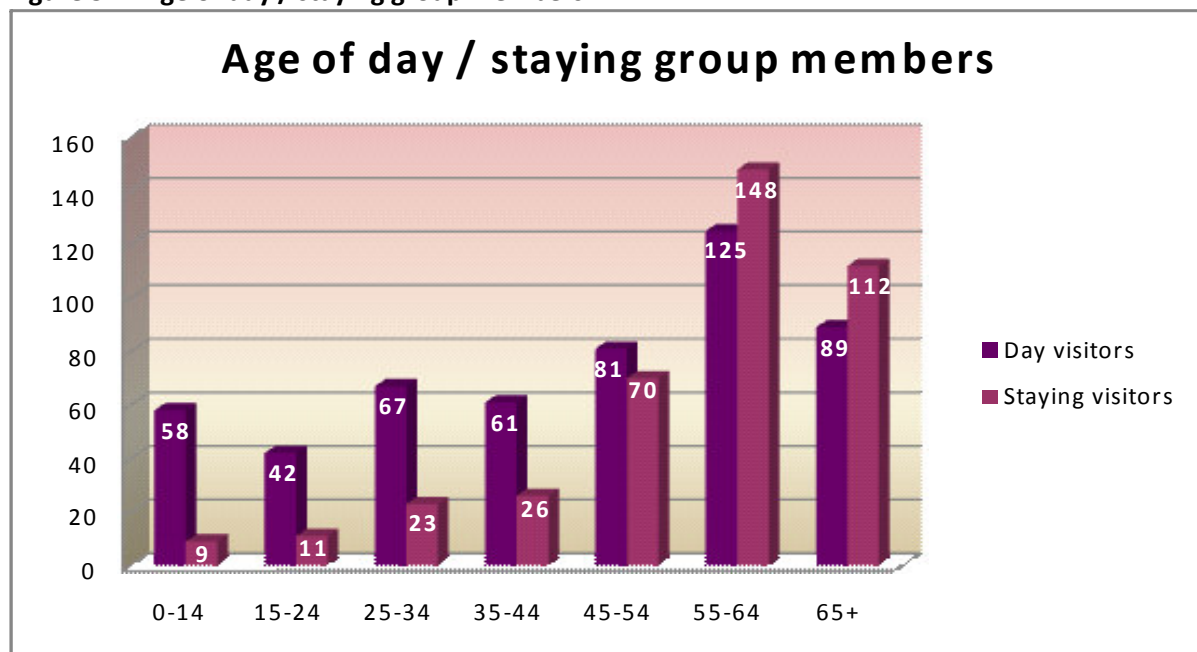


¹⁶ 2005 Falmouth Visitor Survey. Final Report. South West Tourism Research Department. January 2006.

¹⁷ Cornwall Visitor Survey 2006 / 2007. South West Tourism Research Department for Visit Cornwall. 2007.

In total, 77% of all group members were over 35 years of age, broadly in line with the 2005 Falmouth visitor survey findings. However younger visitors under 24 only accounted for 13% of all 2008 Regatta group members. This represents a significant drop on the numbers reported in 2005 (22%), but is in line with the timing of the event which took place after the start of the new school term.

Figure 5.2: Age of day / staying group members



In terms of the ages of day visitors and staying visitors (Figure 5.2), the day visitor group had a significantly higher percentage of younger visitors (19% of day visitors were 24 or younger compared to just 5% of staying visitors). The day visitor figure is much closer to the 22% who were under 24 reported in 2005. This could be explained by the fact that this group is more likely to be local or living within Cornwall and therefore it is probably easier for them to visit the Regatta and still attend to their obligations, such as school or college, than their counterparts in the staying visitor group.

Visitors from both groups were most likely to be aged from 55-64 however the staying group had a higher percentage of visitors over 55 (almost two thirds, 65%, compared with 41% of day visitors). Furthermore, over eight in ten staying visitors (83%) were over 45 compared with just over half of all day visitors (56%). This higher percentage of older visitors could reflect retirees who may have fewer constraints on their free time.

All of the above findings linked to the age of the audience present at the 2008 Regatta indicated that the timing of the event to take place both in September and after the start of the new school term undoubtedly had an impact on the type of visitor present. Unsurprisingly, the event attracted a much older audience compared with those typically attracted to Falmouth and Cornwall respectively¹⁸ and this is reflected by the large majority of staying visitors who were from the older, predominantly retired age brackets.

5.2.3 Economic status and social class

In total, almost two thirds of all visitors to the Regatta were employed (61%), indicating a drop compared with the findings from 1998 (71%). Nonetheless, this could explain the increase in the

¹⁸ Compared with the 2005 Falmouth Visitor Survey and the 2006/2007 Cornwall Visitor Survey.

number of retired visitors, which is up in 2008 to one third (35%) from just one quarter in 1998 (26%). Again, this is likely to be attributable to the timing of the event. The majority of the 2008 event happened on weekdays – Wednesday, Thursday and Friday - compared with last time in 1998 when it was evenly split, starting on a Thursday. Moreover, most families would have been back at school and work by the time the event was held in mid September. These two factors would undoubtedly have had an impact on the number of employed visitors who could attend the event.

Further analysis of the economic status by day and staying visitors highlights a similar picture. Two thirds of both the day and staying visitor groups were in some form of employment and retired visitors represented over a third of visitors in each group (31% of day visitors compared to 39% of staying visitors). The minority of remaining visitors were either unemployed, in education or at home with children (this group represented 6% of day visitors and just 2% of staying visitors).

In total, 59% of visitors surveyed who were in employment were ‘white collar’ ABC1s compared with 72% to the 1998 event. However, this reflects the increase in retired visitors to the 2008 event and moreover, the 2008 figure is higher than the current average for Cornwall at 53%¹⁹.

¹⁹ Cornwall Visitor Survey 2006 / 2007. South West Tourism Research Department for Visit Cornwall. 2007.

6. Impact on Businesses

This chapter discusses the impact of the Regatta on businesses in Falmouth and the surrounding area. It draws upon the research findings from the business telephone, postal and e-survey to identify:

- Changes in turnover;
- Perceived impact on their businesses; and
- Other effects experienced.

A total of 210 establishments were consulted for the business survey. The majority of these (45%) were accommodation providers; 20% were tourism and hospitality businesses; 19% were retail; 14% were from the marine sector and 2% were taxi firms. Further analysis indicates that the locations of the businesses were as follows:

Business type	Locations			Totals
	Falmouth	Truro, Roseland & Wider Carrick	Outside Carrick	
Marine	19	8	3	30
Accommodation	46	25	24	95
Tourism & Hospitality	41	1	-	42
Retail	31	8	-	39
Other (Taxi firms)	4	-	-	4
Totals:	141	42	27	210

In total, this means that two thirds of the businesses surveyed (67%) were from Falmouth, 20% were from Truro, Roseland & Wider Carrick and 13% were from outside Carrick, however, this group were either accommodation providers or marine businesses.

6.1 Changes in turnover

Businesses were asked a series of questions related to their turnover. In total, half of the businesses surveyed (105 of 210) did not see a significant change in the turnover of their business during the period of the 2008 Regatta. Nonetheless, 46% (96) did, and encouragingly, 89% of this group had seen an increase compared with just 11% reporting a decrease. Further analysis of this group indicates that:

- Almost half (47%) of the businesses that increased their turnover reported it increasing between 11 and 30%; and
- Those businesses that saw a decrease were likely to have experienced quite a significant change; almost half (45%) reported a 21 to 30% decrease, whilst over a third reported a 41 to 70% decrease (36%).

Whilst the number to see a decrease in turnover during the event was low, section 3.4.2 identified this as being attributable to the lack of signage directing visitors to businesses on the Moor.

Turnover at same time in '07	
£300 to £1,000	16%
£1,100 to £2,000	10%
£2,100 to £3,000	17%
£3,100 to £4,000	13%
£4,100 to £5,000	14%
£5,100 to £6,000	8%
£6,100 to £10,000	5%
£10,100 to £15,000	8%
£15,100 to £20,000	5%
£20,100 to £90,000	3%
Base = 92	

Businesses were also asked for their turnover for the same week last year. The turnover figures provided by businesses for the same week last year are banded in the adjacent box. Analysis of the figures provided show the average turnover of businesses for the same period last year be £6517.41.

Further interrogation of the average turnover in terms of the impact of the experienced increases and decreases reported by businesses highlights some encouraging findings. As explained previously, the large majority of businesses reported an increase in turnover during the Regatta rather than a decrease. Almost one fifth of businesses saw a 20% increase, which equates to an additional £1303.48 on the average turnover in the same period last year; 14% saw a 30% increase equating to an additional

£1955.22 and one in ten businesses who provided turnover figures saw a 50% increase, equating to an additional £3258.71.

Whilst only 11 of the businesses surveyed saw a decrease in turnover compared with the same period last year, the largest number of these (3) saw a 25% decrease equating to a drop of £1629.35. Two businesses in each case saw a 30%, 50% and 70% decrease in turnover from last year, equating to losses of £1955.22, £3258.71 and £4562.19 respectively.

6.2 Perceived impact on local business

The majority of businesses were pleased with the impact that the regatta had on their business. More specifically, 35% of all 210 businesses surveyed stated that it had a very positive effect, whilst 46% stated that it had a fairly positive effect. The next largest group (34%) felt that the regatta had simply not affected their business. Impressively, only a small number (3% in total) reported that the Regatta had actually had either a fairly or very negative impact.

A consistent comment from the accommodation providers was that whilst the Tall Ships Regatta was a “good thing for Falmouth in general” September is part of their peak season. Therefore many hotels and B&Bs would normally expect to be full during that week. Nonetheless, many businesses surveyed in Falmouth, did feel that due to the Tall Ships Regatta demand for accommodation was higher than normal and they found themselves having to turn down much more business than in recent years. Some Falmouth-based accommodation providers commented:

“I could have filled up my rooms 10 times over; I only booked in guests for week long stays because demand was so high.”

“Demand definitely exceeded availability for us that week!”

As perhaps would be expected, one business commented that they believed the Regatta had had more of an impact on the tourism and hospitality industry, than the retail industry. Whilst less retail businesses located outside Falmouth saw an increase in business as a direct result of the event, it became apparent from the comments of those surveyed that a positive knock-on effect of high demand for bed spaces was experienced by accommodation providers living further afield:

“I was full to capacity for the whole event – I live miles from Falmouth but had lots of requests for accommodation.”

Furthermore, almost one third of the businesses surveyed outside Carrick reported that the Regatta had had a positive effect on their business. Several accommodation providers elaborated to say that they had received visitors to stay who were on holiday especially for the Regatta, resulting in additional business that they otherwise might not have seen. The locations for these businesses included St Austell, Looe and Bude. Whilst not all businesses surveyed from outside Carrick had experienced a direct positive impact, most were positive about its benefits for the county as a whole. One accommodation provider in Launceston added:

“It has had no impact on my business whatsoever as I own holiday cottages in Launceston so am too far away to get any benefit from the event, but I think it's a really positive event for Cornwall generally.”

6.3 Other effects

Extra advertising / promotion	59%
Stayed open later	42%
Special exhibitions / displays	40%
Employed extra staff	34%
Extra products / lines	32%
Provided extra hospitality for clients	16%
Produced special items for the event	12%
Conducted a special mail shot	10%
Other	9%
Base = 91	

Just over two fifths (43%) of all businesses surveyed had undertaken some form of business development especially for the Tall Ships Regatta. A breakdown of business development in terms of popularity for the Tall Ships Regatta is listed in the adjacent box.

There was no overriding similarity in terms of the methods of the businesses that had used an “other” form of business development. The diversity of methods detailed included:

“dressing up as pirates;” and

“hir[ing] out bikes and [running a] free Kayaking session for cadets;” or

“develop[ing] a news item about the event on [their] website to encourage more guests and issu[ing] all guests with leaflets [about] the event during their stay.”

On the whole, businesses felt that the Regatta had not unduly affected their suppliers, with over three quarters (76%) of all businesses surveyed (160 of 210) subscribing to this view. The majority also said that neither their customers (64%) nor their staff or manager’s (81% and 82% respectively) ability to work normally had been affected.

Of the businesses that felt the Regatta had impacted their suppliers, customers, staff or manager, the main reason provided was poor access into Falmouth. This impacted staff being able to reach work on time and also meant that some suppliers had to make early deliveries in order to beat the rush and road closures put in place. Parking was also felt to be an issue that had an impact on some businesses consulted.

In terms of customers, the impact of the event had both positive and negative outcomes. Whilst some businesses saw increased custom through their doors, others (primarily those businesses on

The Moor) lost their regular customers to the Events Square end of town. The shops that saw increased custom said that their customers sometimes had to queue because of this and that staff were often *“run off of [their] feet”*. Some staff that worked for businesses with an increase in customer levels also had to work more shifts than usual in order to cover the increased business.

7. Concluding Comments

This final section of the report presents our conclusions of the research based on the information obtained through the fieldwork and subsequent analysis. The impact of the event is discussed in section 7.1 and recommendations for future similar events in Falmouth and Cornwall are outlined for thought and guidance in section 7.2, detailing the key successes and issues experienced at the 2008 Regatta.

When considering the following conclusions, it is important to note the boundaries discussed in section 2 of this report linked to study coverage, study method, and comparisons made between the 2008 Regatta and other events.

7.1 The impact of the Funchal 500 Tall Ships Regatta 2008

The research identified a series of key findings associated with the overall impact of the Funchal 500 Tall Ships Regatta on Falmouth and the surrounding area, linked to:

- Visitor numbers and expenditure;
- Visit patterns and trends;
- Visitor profiles; and
- Impact on local businesses.

7.1.1 Visitor numbers and expenditure

In total, just over 66,000 visitors came to the Tall Ships Regatta on a total of the 111,500 days. Moreover, figures identified through the Visitor Survey reveal the spend for both day and staying visitors on the Saturday was relatively high, potentially due to the higher number of people travelling further into Falmouth to see the event.

These findings indicate that just over £12million of direct expenditure was generated for the local economy. Whilst this is less than the £24million calculated in 1998, this is undoubtedly due to the smaller scale of the 2008 Regatta and therefore fewer visitors to the event in comparison.

Average daily expenditure per person to the Regatta was high and broadly in line with the expenditure of visitors to Cornwall in general. In both cases, spend was highest for accommodation, eating and drinking and shopping but lowest in terms of entertainment. One marked difference was that visitors to the 2008 Regatta showed a significantly larger spend on travel than general visitors to Cornwall. This goes some way to illustrating the 'pull factor' of the event.

Over £6million of the direct expenditure identified was generated by additional trips specifically for the Regatta and would arguably have not otherwise been spent. This figure demonstrates the boost that the event has had for the local economy.

7.1.2 Visit patterns and trends

In the lead up to and during the event, the Regatta generated a lot of coverage in the press and through other avenues that contributed to the interest amongst both the local and staying visitors alike. Staying visitors obtained their information on the Regatta from a more varied range of sources than day visitors, suggesting that they were purposefully researching the Regatta. Nonetheless the Business Survey uncovered some feeling that more could be done in future to increase advertising efforts of events to a wider geographical area, such as targeting a national audience.

The Visitor Survey findings indicated that over half of all visitors would not otherwise have visited Falmouth, or indeed Cornwall, during that week and that the event attracted the affluent short break and additional holiday market in the greatest numbers.

There was an overwhelming response from visitors that they had enjoyed their visit to the Regatta (particularly focussed on the atmosphere, entertainment and hospitality provided). Many made repeat visits and almost three quarters felt that the Regatta was entirely sufficient for occupying the full trip, with the average length of stay at around 6 hours.

These key findings linked to visit patterns and trends are extremely positive for the organisers and indicate a high level of interest and satisfaction amongst visitors.

7.1.3 Visitor profiles

Nearly all visitors to the Tall Ships Regatta 2008 were from the UK and two thirds were usually resident in the South West, which was significantly higher than the composition of visitors to Cornwall generally; moreover, 75% of these were resident in Cornwall. These findings reflect a high proportion of day visits to the event and short breaks from nearby counties compared with the general holiday patterns of visitors to Cornwall.

The timing of the 2008 Regatta was shown to have had an impact on visitor types. There appeared to be a slight decline in the average number of staying visitors per group to the 2008 Regatta compared with visitors to Falmouth generally²⁰. The event also attracted a significantly older audience than would normally visit Falmouth, and there was a drop in the number of employed visitors compared with the findings of the 1998 study.

The 2008 event was held in mid September after the start of the new school term and, unlike in 2008, it ran over 3 weekdays from Wednesday through to Saturday rather than from Thursday to Sunday in 1998. These timing factors undoubtedly had an impact on the number of families and workers who were able to attend the event.

Despite the timing of the event, 59% of visitors surveyed who were in employment were 'white collar' ABC1s, which is higher than the current average for Cornwall at 53%²¹.

7.1.4 Impact on local businesses

Survey findings indicated that nearly half of all businesses had experienced a significant change in their turnover during the week of the event and nearly all of these had reported an increase. Most impressively, one in ten businesses reported a 50% increase, equating to an additional £3258.71 on

²⁰ 2005 Falmouth Visitor Survey. South West Tourism Research Department. 2006.

²¹ Cornwall Visitor Survey 2006 / 2007. South West Tourism Research Department for Visit Cornwall. 2007.

the average turnover for the same period last year and almost one fifth reported a 20% increase, equating to an additional £1303.48.

Demand was found to exceed availability for many accommodation providers surveyed, many of whom had been booked up months in advance of the event. This positive impact was felt by accommodation providers predominantly within the Falmouth, Truro, and Roseland triangle but extended as far afield as Looe and Bude in the east of the county.

Businesses generally felt that the Regatta had not had an impact on their ability to operate as normal; however for the minority who had been affected poor access was the key issue. Whilst many businesses reported increased custom through their doors, others (primarily those businesses on The Moor) lost their regular customers to the Events Square end of town. Although the number of businesses to see a decrease in turnover during the event was low, the lack of signage directing visitors to businesses on the Moor was highlighted as a prevalent issue.

Nonetheless, local businesses were pleased with the impact that the Regatta had on their operations and were confident that events like this are extremely beneficial for the local area through the amount of good publicity they generate.

7.2 Recommendations for future events

There are several lessons that can be learned from the Funchal 500 Tall Ships Regatta 2008 that should be addressed for future events in Falmouth, wider Carrick or Cornwall on the whole. These include:

- **Resourcing an improved visitor count.** The improved accuracy of figures through use of a helicopter to provide aerial shots of the crowds around the headlands on race day and to allow for a large number of volunteers conducting the visitor count, would help to ensure that a robust foundation is developed upon which strategic decisions about visitor numbers can be made.
- **Revision of the survey method to incorporate more spectator interview locations.** In addition to resourcing an improved visitor count, an increased number of visitor survey interviews conducted at more spectator locations along the headlands, would also help to achieve a more robust set of Race day and spectator data.
- **The use of signage to re-direct visitor footfall.** Improving the amount and location of event signage displayed around the host town at future events would help to re-direct pedestrian flow and draw people to otherwise neglected areas.
- **Development of targeted marketing approaches for similar events.** A clear profile emerged of the visitors attracted to the Funchal 500 Tall Ships Regatta. This presents opportunities to target marketing efforts for future similar events at specific market segments, potentially addressing a wider (if not national) audience.
- **Consideration of accommodation supply.** The Visitor and Business Surveys both uncovered a demand for accommodation in and around Falmouth that outstripped supply. In some cases, visitors making an additional trip specifically for the Regatta were found to be staying outside of the Carrick district. Consideration of available bed spaces and potential solutions in the early event planning stages (i.e. use of University accommodation during holiday season as an over-flow facility) could help to maximise the economic impact of the event and prevent leakages.
- **Consideration of event timing.** The 2008 Regatta took place from Wednesday through to Saturday (3 of 4 days were working weekdays) and in mid September after the start of the new school term. These factors undoubtedly had an impact on visitor numbers and visitor types to the event and therefore, consideration must be given wherever possible to the timing of the event and the desired audience at the planning stage. Running an event during the holiday season and making optimum use of the weekend days would help to boost visitor numbers to future events held.

Appendix 1 Questionnaires and topic guides

Full Length Visitor Questionnaire: 10 – 13 September 2008

Hello, my name is ... from Step Ahead Research. We are carrying out a survey of visitors to the Funchal 500 Tall Ships Regatta on behalf of event organisers, Carrick District Council. Can you spare a couple of minutes please to answer some simple questions about your visit? We do not need any details of your name or address and your answers are completely confidential.

Firstly, can I check the Funchal 500 Tall Ships Regatta is an important reason for you coming down here today? If respondent answers **NO**, STOP. If respondent answers **YES**, then CONTINUE.

Section A: ALL VISITORS

A1. How did you first find out about the Tall Ships event in Falmouth? **Tick one box only**

- | | |
|--|---|
| <input type="checkbox"/> ¹ Recommendation / Word of mouth | <input type="checkbox"/> ⁶ Magazine |
| <input type="checkbox"/> ² Internet | <input type="checkbox"/> ⁷ Television |
| <input type="checkbox"/> ³ Newspaper | <input type="checkbox"/> ⁸ Leaflet / Programme |
| <input type="checkbox"/> ⁴ Radio | <input type="checkbox"/> ⁹ By chance |
| <input type="checkbox"/> ⁵ At another show / event | <input type="checkbox"/> ¹⁰ Other (please specify)..... |

A2. Have you – or do you intend to – visit the Regatta on any other days this week? **Tick one**

- | | | | |
|---|---|--|---|
| <input type="checkbox"/> ¹ Yes | <input type="checkbox"/> ² No | <input type="checkbox"/> ³ Don't know | |
| If YES , tick all that apply: | | | |
| <input type="checkbox"/> ¹ Wed | <input type="checkbox"/> ² Thu | <input type="checkbox"/> ³ Fri | <input type="checkbox"/> ⁴ Sat |

A3. Would you have visited Falmouth today if the Tall Ships Regatta was **NOT** taking place? **Tick one**

- | | | |
|---|--|--|
| <input type="checkbox"/> ¹ Yes | <input type="checkbox"/> ² No | <input type="checkbox"/> ³ Don't Know |
|---|--|--|

A4. Which of the Regatta sites have you visited (or do you intend to visit) today? **Tick all that apply**

- | | |
|---|--|
| <input type="checkbox"/> ¹ The Docks | <input type="checkbox"/> ⁷ Pendennis Castle |
| <input type="checkbox"/> ² Entertainment Centre (Events Square) | <input type="checkbox"/> ⁸ National Maritime Museum Cornwall |
| <input type="checkbox"/> ³ Custom House Quay | <input type="checkbox"/> ⁹ Skinner's Bar (Church Street Car Park) |
| <input type="checkbox"/> ⁴ Shopping Village (Church Street Car Park) | <input type="checkbox"/> ¹⁰ Pendennis Point |
| <input type="checkbox"/> ⁵ The Moor | <input type="checkbox"/> ¹¹ Gyllyngvase Beach |
| <input type="checkbox"/> ⁶ The Poly | <input type="checkbox"/> ¹² Other (please specify)..... |

A5. Will you be visiting any other events / attractions in this part of Cornwall in addition to the Tall Ships event on your trip? **Tick one**

- | | | |
|---|--|--|
| <input type="checkbox"/> ¹ Yes | <input type="checkbox"/> ² No | <input type="checkbox"/> ³ Don't Know |
|---|--|--|

If **YES**, which ones?

.....

A6. How did you travel here today? **Tick one**

- | | |
|--|--|
| <input type="checkbox"/> ¹ Car | <input type="checkbox"/> ⁵ Park and Ride / Float |
| <input type="checkbox"/> ² Train | <input type="checkbox"/> ⁶ Cycle |
| <input type="checkbox"/> ³ Bus | <input type="checkbox"/> ⁷ Walk |
| <input type="checkbox"/> ⁴ Boat / Ferry | <input type="checkbox"/> ⁸ Other (please specify)..... |

A7. Approximately how long are you staying at the Regatta / in Falmouth today? (**Hours**).....

A8. The purpose of this research is to establish the economic impact of the Funchal 500 Tall Ships Regatta on the surrounding area and so we are looking to collect information from visitors about the amount spent during their trip to the Tall Ships event. Therefore, please could you tell us approximately how much will **you and your immediate group of family and / or friends** spend **TODAY ONLY**, on...

- ¹Travel (petrol / parking / fares) £
- ²Eating & drinking (pubs, restaurants, event sites etc) £
- ³Entertainment (including entry to attractions) £
- ⁴Buying clothes £
- ⁵Other shopping / spending £

A9. How old are you and the members of your group?

Please write the number of people in each age category

Age	0-14	15-24	25-34	35-44	45-54	55-64	65+	Total
Number								

A10. Are you in Falmouth... **Tick one**

- ¹ Staying away from home? **Continue to Section B**
- ² On a day trip from home today? **Continue to Section C (Overleaf)**

Section B: STAYING VISITORS ONLY

B1. What type of trip do you consider this to be? **Tick one**

- ¹Your main holiday of 2008
- ²An additional holiday
- ³A short break
- ⁴A business trip

B2. Are you staying in the Falmouth, Truro and Roseland area? **Tick one**

- ¹Yes
- ²No
- ³Don't Know

B3. How many nights are you staying in Cornwall? **(no. of nights).....**

If NONE (i.e. not staying in Cornwall) Go to Section C

B4. What type of accommodation are you staying in? **Tick one**

- ¹Hotel, Guesthouse, B&B, Farmhouse
- ²Self catering cottage **Continue to B5**
- ³Static caravan / chalet
- ⁴Touring caravan / camping

<input type="checkbox"/> ⁶ Boat	
<input type="checkbox"/> ⁶ Second home / timeshare	
<input type="checkbox"/> ⁷ Staying with friends or relatives	Go to Question B8
<input type="checkbox"/> ⁸ Other / more than one type	

B5. Approximately how much will you and your immediate group of family and / or friends spend on accommodation for this trip to Cornwall in total? **Please enter amount** £.....

B6. In what month / year did you make your holiday booking?

..... / 200.... OR ⁸⁸⁸Didn't book, just turned up

B7. Is the Funchal 500 Tall Ships Regatta the main purpose of your stay? **Tick one for each option**

- ¹Yes
- ²No
- ³Don't Know

IF **NOT**, would you have come to Cornwall in 2008 if the Regatta had not taken place?

- ¹Yes ²No ³Don't Know

If **YES** or **UNSURE**, would you have come at a different time of year?

- ¹Yes ²No ³Don't Know

...and would you have stayed in a different part of Cornwall had Tall Ships not taken place?

- ¹Yes ²No ³Don't Know

B8. Including this trip, how many times have you holidayed in Cornwall in the last 10 years? **Tick one**

- ¹First time ⁴7 to 9 times
 ²1 to 3 times ⁵10 or more times
 ³4 to 6 times ⁶Other (**please specify**).....

B9. Do you intend to return to Cornwall on holiday in the future? **Tick one**

- ¹No, never ⁴Yes, later this year
 ²Don't Know ⁵Yes, next year
 ³Yes, another time ⁶Yes, every year

Section C: ALL VISITORS

C1. Are you enjoying your visit to Funchal 500 Tall Ships Regatta? **Tick one**

- ¹Yes ²No ³Don't Know

If **YES**, why?

If **NO**, why not?

C2. Can I please ask, are you...?

- ¹Employed / self employed (**job**)..... ⁴In education
 ²Unemployed / redundant ⁵At home / with children
 ³Retired ⁶Other (**please specify**).....

C3. And finally, do you live in the South West region? **Tick one**

- ¹Yes ²No ³Don't Know

IF **YES**, which county do you live in? **Tick one**

- ¹Cornwall (**town**)..... ⁴Gloucestershire ⁷Bristol & West of England
 ²Devon ⁵Somerset
 ³Dorset ⁶Wiltshire

IF **NOT**, where do you live? **Tick one**

- ¹East of England ⁵North West ⁹Ireland
 ²East Midlands ⁶South East ¹⁰Scotland
 ³London ⁷West Midlands ¹¹Wales
 ⁴North East ⁸Yorkshire & Humberside ¹²Abroad (**country**).....

Thank you very much for your help with this survey

Date: Time: Location: Initials:

Self Completion Visitor Questionnaire: 10 – 13 September 2008

Step Ahead Research is carrying out a survey of visitors to the Funchal 500 Tall Ships Regatta **on behalf of event organisers Carrick District Council**. We would be grateful if you could spare a couple of minutes to answer some simple questions about your visit. We do not need any details of your name or address and your answers are completely confidential.

Section A: ALL VISITORS

A1. Have you – or do you intend to – visit the Regatta on any other days this week? **Tick one**

- ¹Yes ²No ³Don't know
 If **YES**, tick **all that apply**: ¹Wed ²Thu ³Fri ⁴Sat

A2. Would you have visited Falmouth today if the Regatta was **NOT** taking place? **Tick one**

- ¹Yes ²No ³Don't Know

A3. Which Regatta sites have you visited (or do you intend to visit) today? **Tick all that apply**

- | | |
|---|--|
| <input type="checkbox"/> ¹ The Docks | <input type="checkbox"/> ⁷ Pendennis Castle |
| <input type="checkbox"/> ² Entertainment Centre (Events Square) | <input type="checkbox"/> ⁸ National Maritime Museum Cornwall |
| <input type="checkbox"/> ³ Custom House Quay | <input type="checkbox"/> ⁹ Skinnners Bar (Church Street Car Park) |
| <input type="checkbox"/> ⁴ Shopping Village (Church Street Car Park) | <input type="checkbox"/> ¹⁰ Pendennis Point |
| <input type="checkbox"/> ⁵ The Moor | <input type="checkbox"/> ¹² Gyllyngvase Beach |
| <input type="checkbox"/> ⁶ The Poly | <input type="checkbox"/> ¹⁴ Other (please specify)..... |

A4. Will you be visiting any other events / attractions in this part of Cornwall in addition to the Tall Ships event on your trip? **Tick one**

- ¹Yes ²No ³Don't Know

If **YES**, which ones?

.....

A5. The purpose of this research is to establish the economic impact of the Funchal 500 Tall Ships Regatta on the surrounding area and so we are looking to collect information from visitors about the amount spent during their trip to this event. Therefore, please could you tell us approximately how much will **you and your immediate group of family and / or friends** spend **TODAY ONLY**, on...

- | | |
|--|---------|
| <input type="checkbox"/> ¹ Travel (petrol, parking, fares etc) | £ |
| <input type="checkbox"/> ² Eating & drinking (pubs, restaurants, event sites etc) | £ |
| <input type="checkbox"/> ³ Entertainment (including entry to attractions) | £ |
| <input type="checkbox"/> ⁴ Buying clothes | £ |
| <input type="checkbox"/> ⁵ Other shopping / spending | £ |

A6. Are you in Falmouth... **Tick one**

- ¹Staying away from home? **Continue to Section B**
 ²On a day trip from home today? **Go to Section C (Overleaf)**

Section B: STAYING VISITORS ONLY

B1. Are you staying in the Falmouth, Truro and Roseland area? **Tick one**

- ¹Yes ²No ³Don't Know

PTO

B2. How many nights are you staying in Cornwall? **(no. of nights)**.....

If **NONE** (i.e. not staying in Cornwall) **Go to Section C**

B3. What type of accommodation are you staying in? **Tick one**

- ¹Hotel, guesthouse, B&B, farmhouse
- ²Self catering cottage
- ³Static caravan / chalet
- ⁴Touring caravan / camping
- ⁵Boat

Continue to B4

<input type="checkbox"/> ⁶ Second home / timeshare	
<input type="checkbox"/> ⁷ Staying with friends or relatives	Go to Section C
<input type="checkbox"/> ⁸ Other / more than one type	

B4. Approximately how much will **you and your immediate group of family and / or friends** spend on accommodation for this trip to Cornwall in total? **Please enter amount** £.....

Section C: ALL VISITORS

C1. Are you enjoying your visit to the Funchal 500 Tall Ships Regatta? **Tick one**

- ¹Yes
- ²No
- ³Don't Know

If **YES**, why?

If **NO**, why not?

C2. Are you...?

- ¹Employed / self employed (**job title**).....
- ²Unemployed / redundant
- ³Retired
- ⁴In education
- ⁵At home / with children
- ⁶Other (**please specify**).....

C3. And finally, do you live in the South West region? **Tick one**

- ¹Yes
- ²No
- ³Don't Know

IF **YES**, which county do you live in? **Tick one**

- ¹Cornwall (**town**).....
- ²Devon
- ³Dorset
- ⁴Gloucestershire
- ⁵Somerset
- ⁶Wiltshire
- ⁷Bristol & West of England

IF **NOT**, where do you live? **Tick one**

- ¹East of England
- ²East Midlands
- ³London
- ⁴North East
- ⁵North West
- ⁶South East
- ⁷West Midlands
- ⁸Yorkshire & Humberside
- ⁹Ireland
- ¹⁰Scotland
- ¹¹Wales
- ¹²Abroad (**country**).....

Thank you very much for your help with this survey.
Please hand the completed survey back to the point where it was picked up.

Date: Time: Location (event site):

Business Survey Questionnaire (telephone, post & e-survey): 15 – 30 September 2008

Step Ahead Research is currently conducting an economic impact study of the Funchal 500 Tall Ships Regatta in Falmouth on behalf of Carrick District Council. We are collecting the views of a range of businesses in and around Falmouth to understand the benefits and issues for local businesses created by the Tall Ships event. All information requested in the questionnaire will be treated in complete confidence and we hope you will have time to complete it as your views are important and will contribute to the overall study.

When complete, please either:

- Return the completed survey **by post** using the pre-paid envelope provided (no stamp needed)
- **Fax** the completed questionnaire back to us on 01392 433856.

Business Survey

Q1. What is the main activity of your business? (**Tick one option**)

- ¹Retail ²Tourism & Hospitality ³Marine

Q2.a) Did you undertake any form of business development especially for the Regatta? (i.e. increased production, extra advertising, etc) (**Tick one option**)

- ¹Yes ²No ³Don't Know

b) In terms of business development did you do... (**Please answer YES or NO**)

- | | |
|--|--|
| <input type="checkbox"/> ¹ Extra advertising / promotion | <input type="checkbox"/> ⁵ Produced special items for the event |
| <input type="checkbox"/> ² Extra products / lines | <input type="checkbox"/> ⁶ Conducted a special mail shot |
| <input type="checkbox"/> ³ Special exhibitions / displays | <input type="checkbox"/> ⁷ Employed extra staff |
| <input type="checkbox"/> ⁴ Stayed open later | <input type="checkbox"/> ⁸ Provided extra hospitality for clients |

⁹Other (**please give details**):

.....

Q3. Again answering YES or NO for each, did the Funchal 500 Tall Ships Regatta affect:

a) ... Your suppliers?

- ¹Yes ²No ³Don't Know

b) ... Your customers?

- ¹Yes ²No ³Don't Know

c) ... Your staff's ability to work normally?

- ¹Yes ²No ³Don't Know

d) ... Your own ability to work normally?

- ¹Yes ²No ³Don't Know

If YES to any, please give details:

.....

Q4. On a scale of 1 to 5 (1 being V. Positive and 5 being V. Negative) what has been the overall impact **on your business** of the Funchal 500 Tall Ships Regatta?

- | | |
|---|---|
| <input type="checkbox"/> ¹ Very positive | <input type="checkbox"/> ⁴ Fairly negative |
| <input type="checkbox"/> ² Fairly positive | <input type="checkbox"/> ⁵ Very negative |
| <input type="checkbox"/> ³ None | <input type="checkbox"/> ⁶ Don't know |

Q5. The Funchal 500 Tall Ships Regatta took place from Wednesday 10th September to Saturday 13th September. Was there any significant change in the turnover of your business around this time from what otherwise might be expected? **(Tick one option)**

- ¹Yes ²No ³Don't Know

If YES, please put an **approximate figure** on the change in turnover: + / -%

(Please circle / highlight either the plus or minus sign to indicate whether this figure represents an increase or decrease)

For comparison, please provide your turnover for the same week last year: (£s).....

Q6. On a scale of 1 to 5 (1 being V. Positive and 5 being V. Negative) what has been the overall impact **on the economy of the Falmouth area** of the Funchal 500 Tall Ships Regatta?

- | | |
|---|---|
| <input type="checkbox"/> ¹ Very positive | <input type="checkbox"/> ⁴ Fairly negative |
| <input type="checkbox"/> ² Fairly positive | <input type="checkbox"/> ⁵ Very negative |
| <input type="checkbox"/> ³ None | <input type="checkbox"/> ⁶ Don't know |

Q7. On a scale of 1 to 5 (1 being V. Positive and 5 being V. Negative) what has been the overall impact **on the image of the Falmouth area** of the 'Tall Ships' event? **(Tick one option)**

- | | |
|---|---|
| <input type="checkbox"/> ¹ Very positive | <input type="checkbox"/> ⁴ Fairly negative |
| <input type="checkbox"/> ² Fairly positive | <input type="checkbox"/> ⁵ Very negative |
| <input type="checkbox"/> ³ None | <input type="checkbox"/> ⁶ Don't know |

Q8. In one sentence, what could be done to improve this event in the future?

.....

.....

.....

.....

.....

.....

Q9. Do you have any other general comments on the economic impact of the Funchal 500 Tall Ships Regatta, or how it has had an impact on your business.

.....

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.....

.....

Thank you for your help in answering these questions

Please either:

- Return the completed survey **by post** using the pre-paid envelope provided (no stamp needed)
- Or **Fax** the completed questionnaire back to us on 01392 433856.

Visitor Count Form: 10 – 13 September 2008

Site Location..... (Insert count location)	Falmouth Tall Ships Regatta – Visitor Count Sheet
WEDNESDAY / THURSDAY / FRIDAY / SATURDAY (Circle correct day)	

10am – 2.30pm				
Time	Tally Counter Start	Tally Counter End	Number of people counted	Name of Counter (s)
10am– 11am				
11am – 12pm				
12pm – 1pm				
1pm – 2pm				
2pm – 2.30pm				
Total				

2.30pm – 7.30pm				
Time	Tally Counter Start	Tally Counter End	Number of people counted	Name of Counter (s)
2.30pm – 3pm				
3pm – 4pm				
4pm – 5pm				
5pm – 6pm				
6pm – 7pm				
7pm – 7.30pm				
Total				

Thursday Night & Friday Night Only (7.30pm – 9.30pm)

7.30pm – 9.30pm				
Time	Tally Counter Start	Tally Counter End	Number of people counted	Name of Counter (s)
7.30pm – 8pm				
8pm – 9pm				
9pm– 9.30pm				
Total				

Appendix 2 Project Background

There are many reasons why a port may bid to become a Host Port for The Tall Ships Races. Traditionally, huge crowds visit during the four days of the event, bringing welcome additional income to the surrounding area, national and international media attention, increased tourism business and a range of opportunities for community involvement and enjoyment.²²

A2.1 Cutty Sark Tall Ships Races 1998

The last Tall Ship Event hosted by Falmouth 1998, saw 150,000 people gather to watch the Tall Ships Race, on a total of 250,000 visitor days with a total spend by all visitors for the 4 day event of £31m.²³ The 1998 Falmouth Tall Ships Event saw c.90 Vessels (20 Class A and 70 smaller Class B, C, and D ships)²⁴ compared with around the 30 vessels in 2008. Whilst it was expected that the Funchal 500 Tall Ships Regatta was to be a smaller event, with fewer ships and visitor numbers, there was confidence that it would attract significant economic spend to the area and raise the profile of Cornwall as a destination for high quality marine based tourism and event management.²⁵

A2.2 Tall Ships Races 2008

Information has been gathered from the local press and online sources relating to the impact of the Tall Ships Races 2008 (Liverpool, Måløy, Bergen, Den Helder) in order to make comparisons with the Funchal 500 Tall Ships Regatta (Falmouth, Ilhavo, Madeira). It must be noted that the depth of information obtained varied considerably between the host towns and cities of the Tall Ships Races and calculations for the figures quoted were unavailable. Therefore, caution must be taken when making direct comparisons due to the limitations associated with the secondary data collected. The table below highlights the visitor number, population figures and number of vessels for both races.

Table A2: 2008 Race statistics

The Tall Ships Races 2008				
County	Visitor Numbers	Population	No of Class As	No of Vessels
Liverpool, UK	1,000,000	436,100	c. 20	c.60
Måløy, Norway	40,000	3,500	↓	↓
Bergen, Norway	500,000	235,000	↓	↓
Den Helder, Netherlands	500,000	60,000	↓	↓
The Funchal 500 Tall Ships Regatta 2008				
County	Visitor Numbers	Population	No of Class As	No of Vessels
Falmouth, UK	250,000	19,855	c. 10	c.30
Ilhavo, Portugal	?	17,000	↓	↓
Funchal, Madeira	?	c.14,000	↓	↓
The Cutty Sark Tall Ships Races 1998				
County	Visitor Numbers	Population	No of Class As	No of Vessels
Falmouth, UK	250,000	19,855	c. 20	c.90

Source: <http://www.sailtraininginternational.org/page.asp?partid=841> (2008); Tourism Associates (1998)

²² www.sailtraininginternational.org

²³ Tourism Associates. Falmouth Tall Ships Festival 1998: Economic impact & evaluation. University of Exeter.

²⁴ http://en.wikipedia.org/wiki/Falmouth,_Cornwall

²⁵ <http://www.carrick.gov.uk/index.cfm?articleid=25125>

Liverpool was the only other UK host city in 2008 for a Tall Ships race. The Tall Ships Race 2008 between July 17 and July 21 in Liverpool attracted 1,000,000 visitors for the 4 day event and 500,000 for race day²⁶; of these, 76,659 were first time visitors²⁷. Research by The Mersey Partnership indicated that direct spend by visitors was almost £34m, although the actual full economic impact of the event to Wirral will be greater as residents also attended the event, taking the total spend figures to over £1,500,000. There were also high levels of visitor satisfaction as 99% of those questioned were satisfied with the day overall.²⁸

In terms of additionality, the Tall Ships Races in Liverpool attracted approximately 32,400 non-resident visitors to the Wirral area, an estimated 16,000 of which were visiting the Wirral for the first time. Almost all of these visitors would not otherwise have made a visit to Wirral during the week of the event.²⁹

A2.3 Points of comparison

As previously mentioned, whilst caution must be taken in making direct comparisons between the events, some points of comparison can be discussed.

A2.3.1 Size of the Host port

It is important to note the varying sizes of the host ports when comparing visitor numbers. Liverpool has a population of approximately 436,100, which is over 22 times greater than the population of Falmouth. Similarly, the population of Bergen (Bergen) is over 11 times larger at 235,000 and Den Helder (Netherlands) is approximately 3 times bigger (60,000). Initial comparison between visitor numbers may look disappointing at first glance, but taking into account the population figures and catchment area for these larger host cities, visitor numbers can arguably be considered relatively similar.

A2.3.2 Size of the event

In addition to the effect of the population size and catchment areas of the host city on visitor numbers, the size of the event may also have an effect on the visitor draw. The Tall Ship Races 2008 and the Falmouth 1998 race both attracted a higher number of visitors but they also had at least double the number of vessels participating in the event. It is possible that the scale of the event in terms of the number of tall ships taking part plays a part in the tourist's decision-making process to attend a particular host city.

A2.3.3 Public transport

Public transport emerged to be one of the main themes for each of the Tall Ships host towns and cities. Due to the large scale nature of the events, transport operations needed to be exceptional in the management of vast numbers of visitors to local areas.

²⁶ <http://www.liverpoolecho.co.uk/liverpool-news/capital-of-culture/tall-ships/2008/07/22/one-million-reasons-to-be-proud-of-liverpool-s-culture-year-of-fun-100252-21381795/>

²⁷ <http://www.liverpooldailypost.co.uk/business/business-local/2008/07/31/tall-ships-website-breaks-visitor-number-records-64375-21438256/>

²⁸ <http://www.aboutmyarea.co.uk/Merseyside/Wirral/CH48>

²⁹ <http://www.aboutmyarea.co.uk/Merseyside/Wirral/CH48>

In Liverpool, visitors were encouraged to leave their cars at home, every carriage in their train service was deployed across the Mersey rail network, the biggest park and ride service ever staged in the region was co-ordinated, a greater number of bus journeys was provided per hour and a shuttle service to the Dock area every 10-25 minutes was introduced.³⁰ Further to this, around 50 roads were also closed in Wirral during the Tall Ships event.³¹ Whilst every measure was taken to encourage the use of public transport, there was still an issue amongst visitors regarding car parking prices, turning grassland into parking areas for the event and charging motorists for parking their cars, whilst other areas were free to park.³²

Bergen attributed a number of transport management operations to cope with the increase in visitors to the local area. Bryggen (the main port where the vessels were docked) closed the roads to all traffic during the 4-day event³³. However, in the main area of the city, the transport systems were felt not be sufficient to cope with the greater number of passengers. Furthermore, it was felt that there were not enough regular buses in and around the area. However, it was suggested that this issue was due to the limited available staff resources³⁴.

Overall, it appears that effective public transport systems are imperative in terms of staging large scale events. Whilst only experienced by a minority of visitors to the 2008 Regatta, the cost of parking and lack of suitable public transport times and options available was an issue for some. It appears that comparatively, most host cities experienced some transport-related issues regarding parking and insufficient levels of service suggesting that these issues were not isolated to Falmouth.

A2.3.4 Impact on local business

Economic forecasts estimated that the Tall Ships Races 2008 is likely to bring in £30m to the **Liverpool** area³⁵. Further to this, Bergen saw a 100% sales increase to a number of the cities restaurants compared to the previous week and the corresponding week last year. Cafes and food markets also saw a greater number of customers during the 4-day event. Revenues for hotels, restaurants and shops in the centre are estimated at 200 million kroner (near £19m).³⁶

³⁰ <http://www.liverpool08.com/archive/index.asp?tcaturi=tcm:146-128592&ipage=3&m=Jul&y=08>

³¹ <http://www.liverpoolecho.co.uk/liverpool-news/capital-of-culture/tall-ships/2008/06/25/tall-ships-bring-road-closures-100252-21147753/>

³² <http://www.liverpoolecho.co.uk/liverpool-news/capital-of-culture/tall-ships/2008/07/24/tall-ships-car-parking-storm-100252-21395856/>

³³ <http://translate.google.co.uk/translate?hl=en&sl=no&u=http://www.ba.no/nyheter/article3722966.ece&sa=X&oi=translate&resnum=1&ct=result&prev=/search%3Fq%3Dhttp://www.ba.no/nyheter/article3722966.ece%26hl%3Den%26sa%3DG>

³⁴ <http://translate.google.co.uk/translate?hl=en&sl=no&u=http://www.ba.no/nyheter/article3717647.ece&sa=X&oi=translate&resnum=1&ct=result&prev=/search%3Fq%3Dhttp://www.ba.no/nyheter/article3717647.ece%26hl%3Den%26sa%3DG>

³⁵ <http://www.liverpooldailypost.co.uk/liverpool-news/regional-news/2008/07/19/economy-bonanza-as-golf-and-tall-ships-bring-in-the-crowds-64375-21369023/>

³⁶ Bergen Tidende online – published 13th August 2008