

An aerial photograph of a coastal area. In the foreground, a large, modern building with a curved facade and a yellow section is situated along a road. To its right is a large, paved parking lot with several cars. Further back, there is a green pond with a small structure on its edge. The area is bordered by a sandy beach and the ocean. In the background, there are residential buildings and green spaces.

Opportunities for the Queen's Drive Area.

Introduction

The Queen's Drive site is a special location with the potential to be a very different place and a driver of positive change for the whole town, its economy, culture and profile. Similar to a number of coastal towns, Exmouth is tackling the challenge of attracting younger generations and new visitors to explore its shores, as well as responding to the leisure needs of local residents. Following extensive public engagement and consultation, there is now planning permission to develop the Queen's Drive site for mixed leisure uses including holiday accommodation, retail, a new water sports centre, a new car park and re-routing of the existing road. Alongside this, other smaller interventions are being explored. During summer 2018, change was starting to happen with a temporary play area and event space set up on the site (Queen's Drive Space), offering a taster of how things could be better.

The aim of the survey was to get to the heart of what the mixed use leisure area (Phase 3) of the Queen's Drive development could become, with the help of the public. The on-line survey ran from July to September 2018, to help unpick the thoughts and ideas of respondents as to what they felt would be best for the future of the phase three area. The survey questions responded to ideas, thoughts and concerns brought up in the engagement meeting hosted by Hemingway Design and East Devon Council in Exmouth on 21/06/18. The results help us to better understand the place, what it means to the respondents and what kind of place they would like it to become in the future. This will inform designs and plans for the site.

The following results are taken from 01/10/2018 at which time the survey had a total of 1289 participants. There was great response from the people who live and work in Exmouth (1085) but a much smaller response rate from visitors holiday makers/ leisure users (149). This may impact on the various perspectives and perceptions of the town.



Opportunities for Queen's Drive

HemingwayDesign, specialists in coastal renewal, have been commissioned by East Devon District Council to build a vision from and for a key regeneration location on the town's seafront. The 'Queen's Drive site' is a special location with the potential to be a very different place and a driver of positive change for the whole town, its economy, culture and profile. Similar to a number of coastal towns, Exmouth is tackling the challenge of attracting younger generations and new visitors to explore its shores. Already we are starting to see change happening with the temporary play area and event space on the site (Queen's Drive Space), offering a taster of how things could be better. We aim to get to the heart of what this place could become and to do that we would like your help. This online portal is the major tool we are using to give as many people as possible the chance to

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Interpretation of Views

The respondents had a reasonably strong female bias, and a good age spread.

WHAT IS YOUR AGE?

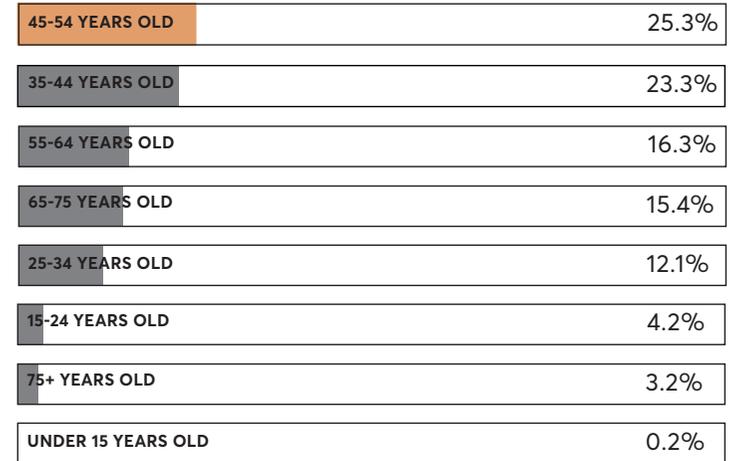


Figure 01

WHAT IS YOUR GENDER?

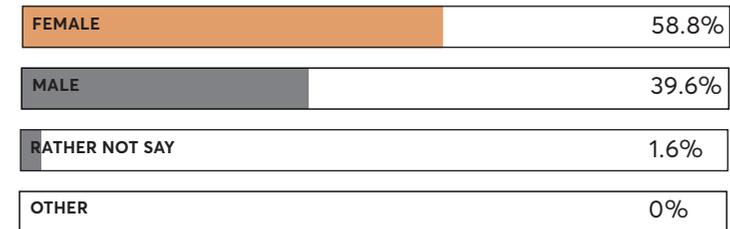


Figure 02

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR CURRENT EMPLOYMENT STATUS?

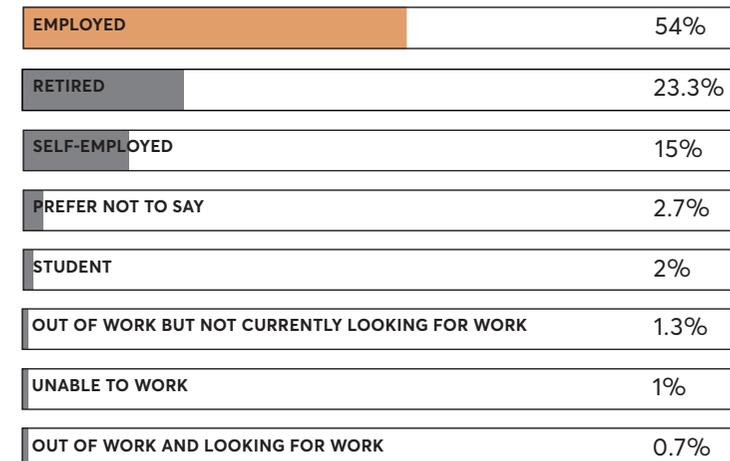


Figure 03

Interpretation of Views

The word cloud shows the words used by respondents to describe what makes Exmouth a good place to live, work and be. The most common words were sea, sea front and estuary, followed by community, people and other elements related to the natural environment. These qualities have clear importance and value to the public and should therefore be enhanced and enabled through the development of the Queen's Drive site. Its unique location and connections to other nearby towns is also highly valued and could suggest a good opportunity to drive the town's visitor numbers and linked economy. This is also driven by respondents comments on its 'unique mix of qualities' and how it is 'alive all year round' (public comment). Additionally, there is a sense of community pride and belief that people are 'changing the place for the better' (public comment).

There is some tension between the respondents' impression of the area being 'traditional' versus it being 'old'. Others thought that it has become staid and needs to feel more lively and forward-facing. Many also commented that investment and interest in Exmouth's town centre was a priority and could, in some way, be stimulated by the development of Queen's Drive.

WHAT IS YOUR RELATIONSHIP WITH EXMOUTH?

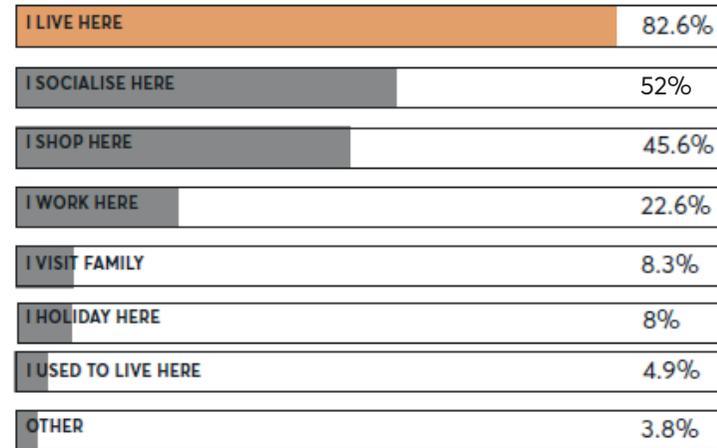


Figure 04



"I have witnessed Exmouth's development over 25 years and the improvements are impressive and needed socially, financially and to promote growth and stability for future generations. The green spaces are important to retain and family events are a 'gift'."

- Socialises and visits family in Exmouth, 55-64, Female

"The town incorporates diverse shops to cater for the needs of both locals and tourists. The estuary and beach give natural beauty to the area. The transport links are excellent. The floral displays make the town aesthetically pleasing compared to some other resorts. It appears to be a safer environment than some other towns nationally."

- Lives, socialises and shops in Exmouth, 55-64, Female

"[There is] a general sense that the place is changing for the better and is big enough in its own right to be able to decide its own future."

- Works and socialises in Exmouth, 55-64, Male

"Exmouth has a unique mix of qualities that attracted us to live in the town. It has obvious natural beauty, but it is also a happy place with a great mix of people young and old who genuinely value living here and who work tirelessly to influence the town in a positive way, through organising events, running charities and generally helping each other out."

- Lives and works in Exmouth, 45-54, Female

"Many talk about pride in living in Exmouth which does not occur in other places."

- Lives, socialises and shops in Exmouth, 55-64, Female

"It has a stunning beach and estuary side, it's a real working town as well as a tourist destination - big enough that you don't have to drive somewhere else for everyday supplies, but small enough to know lots of people. The views are hard to beat, and you can walk or cycle to both coast and countryside within minutes."

- Lives and works in Exmouth, 55-64, Female

"It is beautiful with a lovely beach and estuary; friendly; with good facilities, social and sporting opportunities; and with easy access to the countryside."

- Lives and socialises in Exmouth, 65-75, Female

"Plenty of water sports, places to eat and friendly businesses."

- Lives, works and socialises in Exmouth 55- 64, Female

"Laid back, beautiful stretch of coast."

- Lives in Exmouth, 15-24, Male

"Fantastic beach, proximity to woodbury common, estuary, tranquil landscapes and vistas, access to motorways, relative proximity to Exeter, sporting opportunities including access to water sports, coastal path, mix of old and new buildings in the built environment, friendly people, easy to find peaceful places."

- Lives, shops and socialises in Exmouth, 35-44 years old, female

Interpretation of Views

The development of the Queen's Drive site (phase 3) has the potential to drive positive change for the town and its community. When respondents were asked what they hope its regeneration could do for Exmouth there were two leading (and potentially conflicting) responses that stood out: to maximise the site's natural assets and its proximity to the estuary and nature reserve (67.7%) and to provide an attractive place for people- young, old and in between- to spend leisure time together (66.9%). These desirable characteristics need to be balanced so that a new, dynamic space is designed in such a way so that it respects its natural context and outstanding location. Development should be sensitive to and balance these aspirations wherever possible, viable and deliverable.

Other significant responses (above 40%) were: utilising the site so that it encourages young people to stay in Exmouth, design a place that engages Exmouth's young population and encourages them to live work and stay in the area; kick start investment in the remainder of the town by using the site to showcase Exmouth; activate the existing sports clubs around the site (cricket, tennis and bowling) whilst retaining their authentic charm; generate more development and investment into Exmouth as a whole and create a brand/ vision that unites the town and to exploit Exmouth's tourism potential to become a more enticing coastal destination for visitors seeking innovative recreation and leisure facilities.

WHAT DO YOU HOPE THAT A REGENERATED QUEEN'S DRIVE SITE COULD DO FOR EXMOUTH?

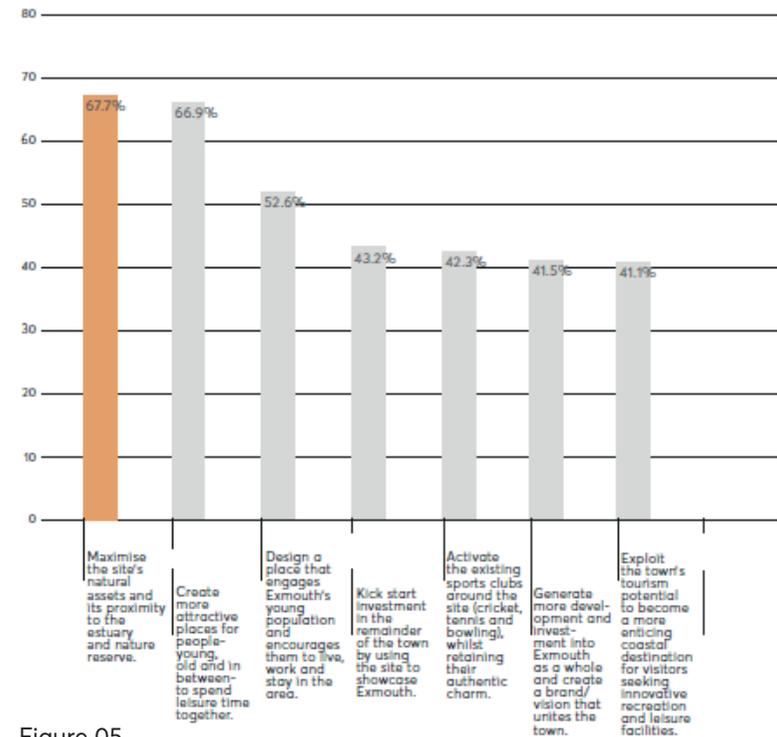


Figure 05

Other comments included:

'Make it feel less like the cheap option and exploit it's heritage'

Visits family in Exmouth, 45-54, Female

'Retain its character and not turn it into an identikit town.'

Lives in Exmouth, 55-64, Male

'Make it a more lively place'

Lives and works in Exmouth, 15-25, Female

'Getting Exmouth talked about as a place to be'

Lives, works and socialises in Exmouth, 45-54, Female

Interpretation of Views

The survey asked what respondents felt would attract new visitors to Exmouth and encourage them to stay for longer and spend money.

The most popular results were to include more leisure options for children and young people, to provide vibrant and sociable spaces to shop; extension of the visitor season through all-weather facilities; more modern places to eat and drink; more leisure options for adults and attractive and navigable walking and cycling routes.

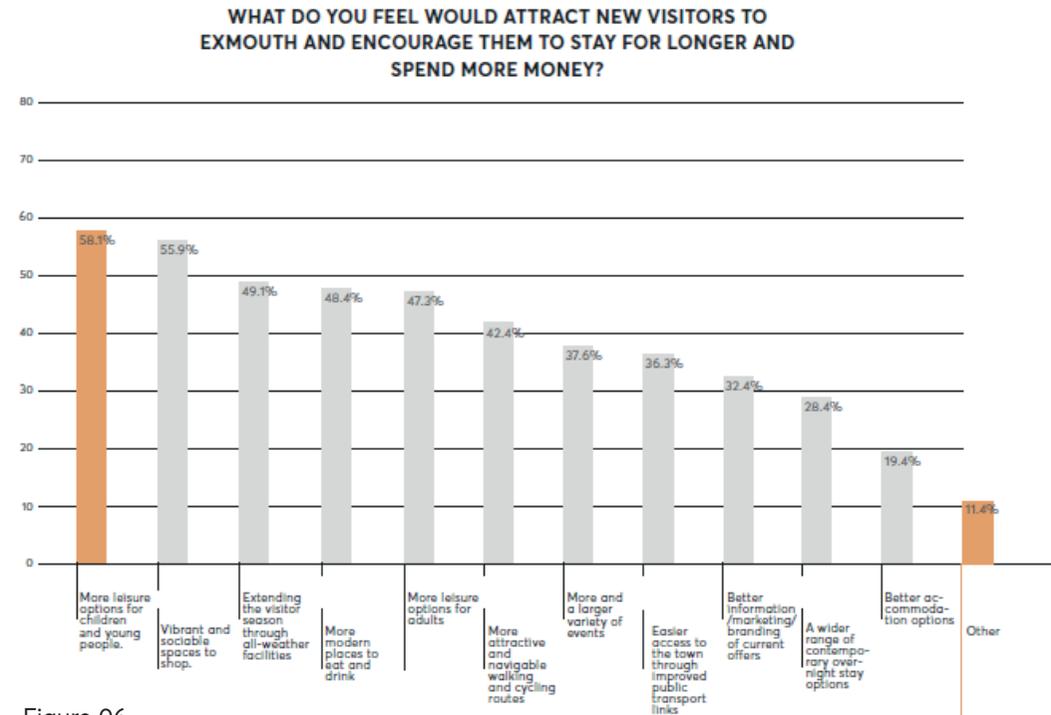


Figure 06

Other comments included:

- “Shared surfaces”/ “pedestrianise”
- “Good” cafes, restaurants and shops”
- “A re-branding exercise with carefully managed social media and marketing”
- “A well-being hub”
- “Develop a unique selling point”
- “Generating the ‘arts’...small studio spaces”
- “A splash/small water park on the seafront
- “modern camping”

Interpretation of Views

The development of Queen's Drive should balance the needs and aspirations of both residents and visitors.

The total number of respondents to this particular question was 1276, of which 1085 are living and/ or working in Exmouth and 149 are visitors and holiday makers to the area. Figure 07 shows a breakdown of the wants and needs of people who live and/ or work in Exmouth and those who visit, holiday or go to Exmouth to spend leisure time.

Residents were more likely to identify vibrant and sociable spaces to shop, more modern places to eat and drink, more leisure options for adults and more and a larger variety of events. By contrast visitors were more interested in leisure options for children and young people. This may indicate that currently visitors come to Exmouth for leisure and family rather than shopping and/ or socialising in adult only groups.

Residents had a less strong response rate for new and alternative accommodation options and better marketing/ branding. This is not surprising since these residents aren't necessarily going to identify a need for modern and flexible accommodation or better information/ marketing etc. because they live here. Accommodation could benefit the site as it provides a year-round operating presence (scale, offer and design must complement the wider offer of the site).

Visitors were more interested in extending the season with all-weather facilities, which may have been led by their previous visits to the area and the lack of offer in wet or cold weather. A higher percentage of visitors felt that Exmouth needed better information/ marketing/ branding of current offers and identified that these would help encourage new visitors to stay longer and spend more money. A desire for a range of contemporary overnight stay options and better accommodation was also higher for visitors/ holiday makers, which is to be expected since these would be the primary users.

WHAT DO YOU FEEL WOULD ATTRACT NEW VISITORS TO EXMOUTH AND ENCOURAGE THEM TO STAY FOR LONGER AND SPEND MORE MONEY?

	Live and/or Work (1085)	Visitor/ Holiday maker (149)
More leisure options for children and young people	57.1% (620)	55.0% (82)
Vibrant and sociable spaces to shop.	57.3% (622)	47.0% (70)
Extending the visitor season through all-weather facilities	48.3% (524)	51.0 % (76)
More modern places to eat and drink	48.9% (531)	43.6% (65)
More leisure options for adults	48.2% (523)	36.9% (55)
More attractive and navigable walking and cycling routes	42.8% (464)	38.9% (58)
More and a larger variety of events	38.9% (422)	28.2% (42)
Easier access to the town through improved public transport links	37.3% (405)	31.5% (47)
Better information/ marketing/ branding of current offers	15.5% (168)	31.5% (47)
A wider range of contemporary overnight stay options	13.9% (151)	27.5% (41)
Better accommodation options	10.9% (118)	19.5% (29)

Figure 07

Interpretation of Views

A temporary play area, with seating, pop-up food and drink stalls and a bar (known as Queen's Drive Space) was installed this summer on part of the Queen's Drive site. During the summer holidays, Queen's Drive Space hosted weekly events including live theatre, film nights and Royal Opera House screenings. 27% (349) of those who live in Exmouth and 20% (29) of visitors used the site three to five times or more, showing its popularity amongst both groups. 1053 (86%) of respondents stated that they would like elements of the Queen's Drive Space offer to become a permanent feature of the seafront offer and 177 (14%) did not.

It is worth noting that 64% of those who did not want any of the elements of the site to become permanent (114 of 179) had never visited the site, whereas 92% (761 of 829) of respondents who had visited the QDS did want some or all of the activities to continue permanently (85% of whom were residents of Exmouth).

Most respondents used the food and drink outlets on the site which included a pop-up bar and more modern, diverse options than the seafront currently offers. The second most popular activity was the play equipment.

Fewer went to see a live performance or show and a small number of comments claimed that they had never heard about the site or these events taking place (9 comments). Better marketing of the space, therefore, can enhance its use.



HAVE YOU USED THE SITE?

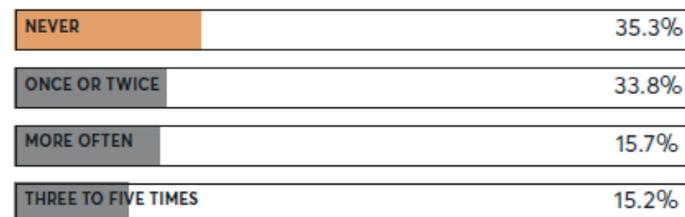


Figure 08

WHAT DID YOU AND THE PEOPLE YOU WENT WITH DO WHEN YOU VISITED THE SITE?

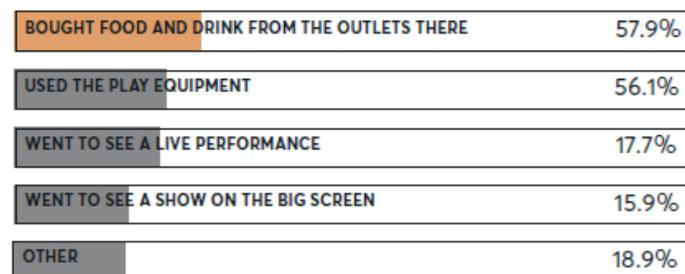


Figure 09

WOULD YOU LIKE ANY OF THESE PARTS TO BECOME A PERMANENT FEATURE OF THE EXMOUTH SEAFRONT OFFER?

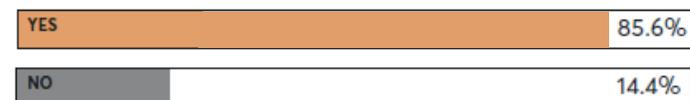


Figure 10

Other comments included:

"I use this site regularly with my children. Not only is it a great park right on the sea front, but the variety of food and drink options make it a place in which you can stay all day or rotate between beach and park - thus keeping tourists on the seafront longer and spending their money."

- Lives, works and socialises in Exmouth, 35-44 year old, Male

"The temporary facilities have been a vast improvement on the pond with swans that was previously on the site. I have used the facilities and believe it has attracted more people to the area - young and old. The food options were great along with the seating area."

- Lives and shops in Exmouth, 65-75, Female

"Children's play park is brilliant and should be kept - good range of age-appropriate equipment. Good relaxing area to meet friends for drink food and a chat."

- Lives, shops and socialises in Exmouth, 45-54, Female

Interpretation of Views

The new water sports centre will have good training and sports facilities and create more available leisure activities for both residents and visitors, whilst opening up more employment opportunities. When respondents were asked what new offers could compliment the centre and its location, they believed that attractive spaces to sit and enjoy views over the estuary were important.

Other popular amenities were: places to eat and drink that were run by independent businesses and an events amphitheatre to stage cultural events all year.

WHAT OTHER NEW OFFERS SHOULD BE DEVELOPED THAT WILL COMPLEMENT THE WATER SPORTS CENTRE AND ITS LOCATION?



Figure 11

Other comments included:

- Sheltered space for parents to sit and watch children play
- Sports courts
- Outdoor public pool
- Splash pad/ Soak zone
- Adventure play area
- Mini Golf
- Wheelchair access for new facilities
- Visitors/ tourist centre e.g. Jurassic Coast centre
- Climbing walls / Boulders
- Fat bike hire
- Indoor leisure with views
- Camper-van/ places for short stays
- Board walk dancing
- Space for yoga
- Spa/ sauna
- pétanque (boules)
- Coastal gardens/planting area
- Education spaces
- Shop selling local crafts and foods
- Educational Workshops

Interpretation of Views

Exmouth is home to less 16 to 34 year olds than the national average and the average across Devon as a whole. Homes and jobs are clearly an issue but the Queen's Drive site might help to support interest in a younger population wanting to live, work or visit the area. For this, many felt that a more active evening event programme and recreation opportunities would be highly successful.

Respondents also felt that relaxing and inspiring places to eat and drink and more leisure offerings would be beneficial to keeping young people living and visiting Exmouth.

There was recurring concern about the lack of employment opportunities in Exmouth likely to prevent young people wanting to live in the town. Thoughts to address this included: training opportunities alongside leisure and hospitality facilities and creative workspaces for young people to set up their own entrepreneurial businesses or work remotely.

WHAT ARE THE THINGS THAT QUEEN'S DRIVE MIGHT CONTRIBUTE TO A MORE YOUTHFUL TOWN?

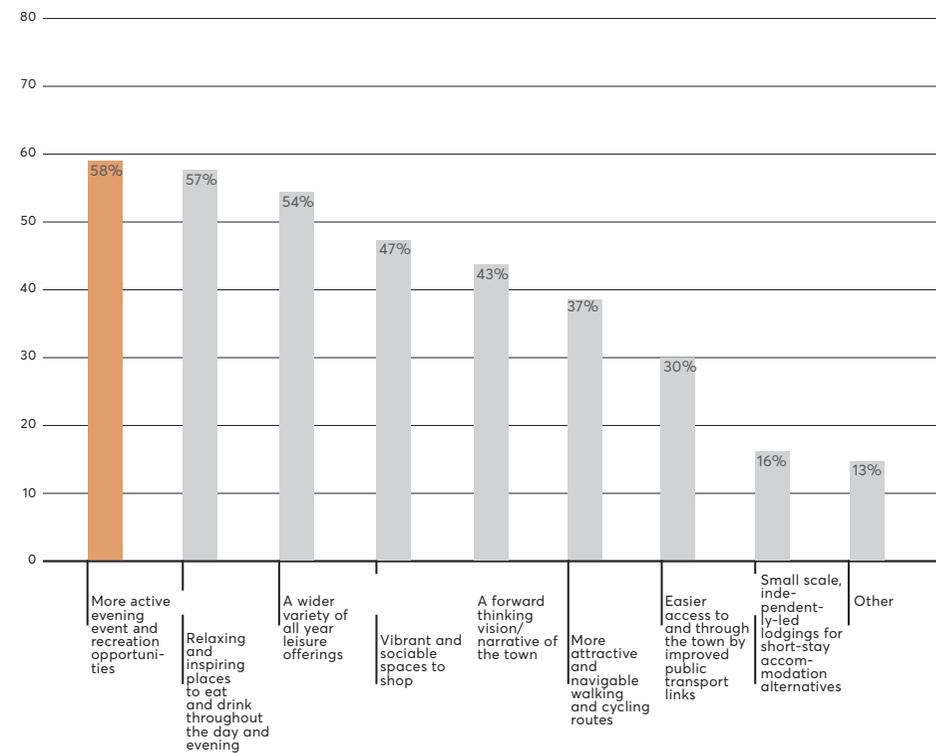


Figure 12

"Exmouth as a whole is too linear to attract and retain visitors. Ideally they need to arrive and be drawn from place to place. There's no obvious route from town to beach"

Lives and shops in Exmouth, 65-75, Male

"Create natural areas for 'discovery' and promote it as a Kite surfing and flying place - nautical outdoor activities need promoting!"

Lives and socialises in Exmouth, 55-64, Female

Other comments included:

- Youth hostel
- Spaces for independent workers
- A sports led lifestyle driven by the opportunities and new facilities on the seafront
- Training opportunities alongside leisure and hospitality facilities
- Creative workspaces for young people to set up their own entrepreneurial businesses

Interpretation of Views

Figure 13 separates out responses to the question 'what are the things that Queen's Drive might contribute to a more youthful town?' by age group. The total number of respondents to this particular question who also stated their age during the survey was 1269. Many thought that more active evening event and recreation opportunities would support this, with the most significant responses coming from younger generations (below 54 years old). Secondary to this, relaxing and inspiring places to eat and drink throughout the day and evening were popular, again particularly with younger generations (below 44 years old).

35-44 year olds thought small-scale independently-led lodgings for short-stay accommodation would attract younger people to live and visit Exmouth, significantly more than any other group.

All-year leisure offerings and more vibrant sociable spaces to shop were more heavily weighted towards the younger generations. Improved public transport links were wanted by both younger and elder respondents, but less by the middle-aged.

WHAT ARE THE THINGS THAT QUEEN'S DRIVE MIGHT CONTRIBUTE TO A MORE YOUTHFUL TOWN?'

	Age						
	15-24 (54)	25-34 (154)	35-44 (295)	45-54 (322)	55-64 (207)	65-75 (196)	75+ (41)
More active evening event and recreation opportunities.	63% (34)	59.7% (92)	66.8% (197)	62.4% (201)	56.5% (117)	38.3% (75)	26.8% (11)
Relaxing and inspiring places to eat and drink throughout the day and evening	75.9% (41)	63.6% (98)	62% (183)	58.7% (189)	52.2% (108)	41.8% (82)	34.1% (14)
A wider variety of all year leisure offerings	63% (34)	56.5% (87)	55.9% (165)	53.7% (173)	53.6% (111)	49.5% (97)	31.7% (13)
Vibrant and sociable spaces to shop	85% (46)	50% (77)	60.7% (179)	60.9% (196)	43.5% (90)	44.9% (88)	34.1% (14)
A forward-thinking vision/narrative of the town	70.4% (38)	37.7% (58)	41.7% (123)	48.8% (157)	40.6% (84)	34.7% (68)	39% (16)
More attractive and navigable walking and cycling routes	35.2% (19)	14.3% (22)	30.8% (91)	46.6% (150)	44.4% (92)	44.4% (87)	46.3% (19)
Easier access to and through the town by improved public transport links	51.9% (28)	13% (20)	32.5% (96)	32.3% (104)	43% (89)	39.3% (77)	53.7% (22)
Small scale, independently-led lodgings for short-stay accommodation alternatives	20.4% (11)	7.8% (12)	35.6% (105)	18% (58)	17.9% (37)	13.3% (26)	24.4% (10)

Figure 13

Interpretation of Views

When asked what the food opportunities on the Queen's Drive site could be, locally sourced food was most important to respondents (71.4%), followed by affordability (68.6%). Evening activity, good design "with views" and outdoor / "bare foot" access to the beach facilities were strongly supported. An independent offer with modern design were also strongly popular.

People wanted to increase the vibrancy and sociability of the place by enabling events and music to be hosted alongside the new food and beverage opportunity. Additionally, for many the environment was important to consider with regards to the food and drink being offered, how they are packaged and how the establishment is run.

Results show a common desire to maintain Exmouth's independent spirit and a strong desire for smaller independent businesses. And, due to the seasonality of the place, flexible units e.g. markets or pop-up food stalls were also presented as a possible consideration for the Queen's Drive site.

WHAT FOOD/ DRINK OPPORTUNITIES DO YOU THINK QUEEN'S DRIVE SHOULD HAVE ?

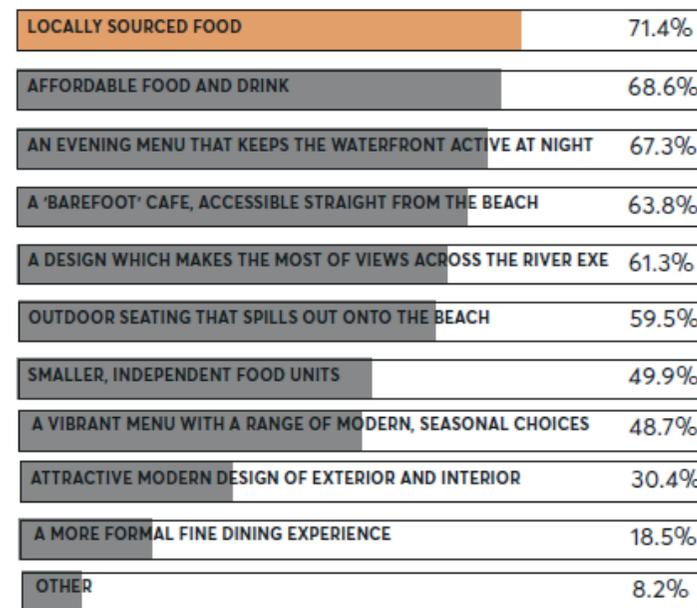


Figure 14

Within the 'other' (8.2%) comments included:

- Events related to food
- Different ethnic food options
- Dog friendly and open all year round
- Include something which becomes bit of a destination offer
- A vegan option- it is the fastest growing social justice movement and is very under-represented in the South West
- Keep Harbour View cafe
- Sunday musicians (from shanty to jazz)
- Places to fill up water bottles for a zero-waste town
- Eco-friendly packaging
- Create pop-up retail for extra demand in summer months

'A new cafe restaurant that makes the most of its location and thats a stand out feature of the regeneration is needed.'

Lives, works and socialises, 35-44, Male

"No chain restaurants please, local businesses with local produce. Healthy food, not fast food"

Lives in Exmouth, 45-54, Female

Interpretation of Views

Respondents to the survey were asking for new things and for development to happen. They were shown example images which also served to help ignite some additional creative thinking about what they thought would be appropriate development for the area. The most favourable concepts for the Queen's drive site were:

- **Indoor / outdoor food court which opens into the evenings.**

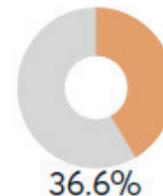
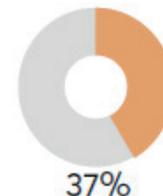
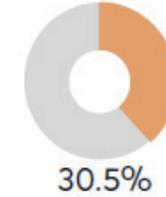
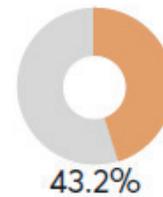
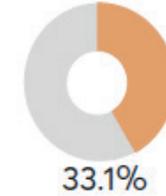
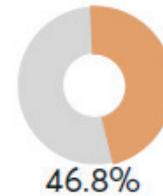
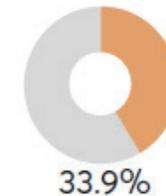
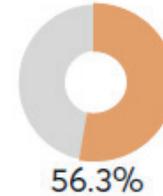
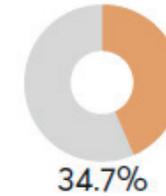
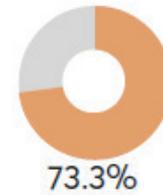
This would be in line with previous comments about making Exmouth more vibrant and helping to attract younger people to live, work and visit Exmouth. Queen's Drive Space offered pop-up food stalls and a bar this summer (2018) which results from the survey showed was very popular.

- **Inclusive play equipment** which could respond to the new deaf school in Exmouth.

- **Challenging play** to allow multi-generations to use it.

- **Bike Hire facilities** would help enable visitors to make the most of Exmouth's existing cycle routes, particularly if brought to this prominent location on the seafront.

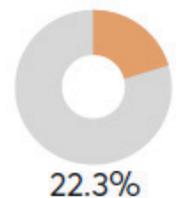
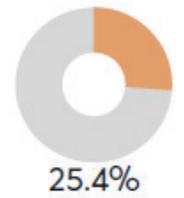
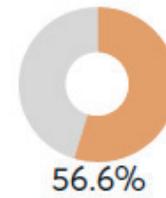
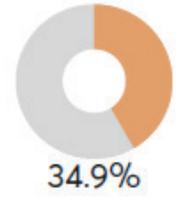
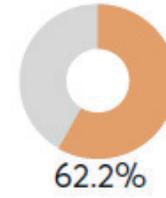
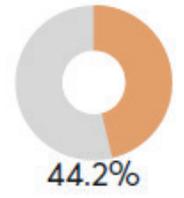
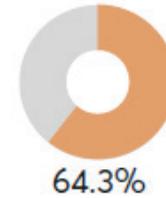
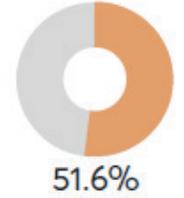
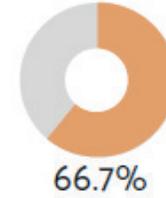
PLEASE SELECT YOUR FAVOURITE CONCEPTS FOR QUEEN'S DRIVE



Interpretation of Views

Alongside development at Queen's Drive, smaller strategies could be put in place that respond to the overall character and help enable a collective understanding about the place. Respondents generally felt that informative, clear wayfinding signage to encourage people to explore all of the interesting nooks and crannies of the surrounding area would be suitable and would be beneficial to the existing bowls, tennis, cricket and leisure facilities. Each of these points to a desire for the integration and permeability of design. Ecological thinking was also a concern which complements people's desire for the development to maximise the site's natural assets and its proximity to the estuary and nature reserve. There is a desire for businesses on the site to be built and operated to the highest environmental standards (60.9%) and for reuse of plastics (39.9%).

WHAT LANDSCAPING/PUBLIC REALM DESIGNS DO YOU THINK ARE APPROPRIATE FOR EXMOUTH?



Interpretation of Views

Key findings

Respondents were asked what they believed was the most appropriate architectural design for Exmouth seafront.

Qualities that people liked:

- Natural materials
- Flexibility to open up
- Responding to the sea front views
- Glass-fronted
- Outdoor space spilling out to sea front
- Modern and striking design

Qualities that were less attractive:

- A more rustic-looking design
- A series of smaller units that complement each other
- Materials that are less natural e.g. Cor-ten steel, shingles
- Bright colours

