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Evaluation of Food Festivals Supported by the Welsh Government for the Financial Period of April 2014–2015

wavehill

social and economic research

ymchwil cymdeithasol ac economaidd

For further information please contact:

Dilys Parker

Senior Manager – Business Development

Food Division

Welsh Government

Tel: 0300 062 203

Email: dilys.parker@wales.gsi.gov.uk

Front cover image from Narberth Food Festival

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Executive Summary

Introduction

The Welsh Government's Food Division (FD) provided grant funding from the Welsh Government's central budget to 25 food festivals in Wales throughout 2015. Welsh Government support for food festivals is underpinned by the Towards Sustainable Growth: An Action Plan for the Food and Drinks Industry (2014-2020), "Delivering Growth"[1], with an aim to grow the food and drink sector by 30 per cent to £7bn by 2020.

The evaluation provides evidence of how the Welsh Government funding of food festivals contributes to the actions outlined in the Action Plan "Delivering Growth"[2], specifically in regards to:

- raising the profile of Welsh food (e.g. Action Point 36)
- taking a co-ordinated approach to developing the sector (e.g. Action Points 33 and 43)
- providing learning, skills development and networking opportunities (e.g. Action Points 4, 5 and 21)
- supporting innovation and developments of products/markets (e.g. Action Points 8, 20 and 31)
- promoting the Welsh language (e.g. Action Point 11)
- supporting small businesses in key food sectors (e.g. Action Points 14, 19 and 23)
- improving access to food (e.g. Action Point 45).

The evaluation in itself contributes baseline data and provides insight into market development strategy, as stated in Action Point 12.

[1] Welsh Government, 2014, *Towards Sustainable Growth: An Action Plan for the Food and Drink Industry 2014-2020:* http://gov.wales/docs/drah/publications/Tourism/150310food-tourism-action-plan-en.pdf

[2] ibid

Method

The evaluation describes food festivals from the perspective of festival organisers, exhibitors and attendees.

1. Consultations with key representatives within the Welsh Government.
2. Telephone interviews with 25 food festival organisers and other stakeholders within the sector.
3. A survey of a sample of 250 producers that exhibited at the food festivals in 2015.
4. A survey of 909 attendees at the six food festivals attended by Wavehill's research team. The festivals attended were:
    - Abergavenny Food Festival
    - Beaumaris Food Festival
    - Conwy Food Festival
    - Newport Food Festival
    - St Fagans Food Festival
    - Narberth Food Festival.
5. Analysis of all evidence gathered for the evaluation, including an economic impact analysis using UK Government-compliant[3] methods to estimate the net additional impacts arising from food festivals.

[3] See, for instance, HM Treasury's Green Book, the Magenta Book, and guidance associated with the Impact Evaluation Framework approach created by BIS for Regional Development Agencies.

Key Findings

Supporting food festivals

- Twenty-five food festivals received support in 2015, with Welsh Government grant value ranging from £1,700 to £15,225.
- The level of funding available for food festivals and the volume of funding applications for food festival support have continued to decline.
- A tiered application system was introduced in 2015 which reduced the paperwork requirement for small grant awards and allowed larger festivals to apply for bigger sums.
- There is a perception that the application process suffers from tight timescales, leading to criticism from applicants.
- Some of the organisers of large festivals do not feel that the application procedure adequately reflects the value of their festival outside of the food sector.

Food festival exhibitors

- Monitoring data provided by the Welsh Government estimates that 930 different organisations exhibited at Welsh Government-funded food festivals in 2015.
- Seventy-six per cent of those exhibiting at the festivals are based in Wales.
- Almost two-thirds (64 per cent; 597/930) of organisations exhibited at just one festival.
- Of the 250 exhibitors surveyed, more than 39 per cent) were less than four years old.
- Ninety-two per cent of the surveyed exhibitors had fewer than 10 employees and 40 per cent had a turnover of less than £25,000.
- Around four in five respondents (81 per cent) actively promote Welsh food and drink at food festivals.
- Half (50 per cent) of respondents said that attending Welsh food festivals had influenced the development of their products.

Food festival attendees

- A total of 909 attendees were surveyed across six festivals attended by the research team.
- Food festivals differ considerably in the size of their catchment area.
- The most frequently cited reason for attending food festivals is to buy local produce.
- For some festivals the reputation of the event may be the most important pull factor, whilst others may capitalise on their proximity to large population centres or tourist resorts.
- Festivals were generally rated most highly for the availability of takeaway food and the range of food and drink on offer.
- Reported levels of enjoyment are not always sufficient to explain whether or not attendees plan to return next year.
- Festivals which are spread over more than one day may benefit from longer attendee stays, but this is not always the case.
- The average spend per adult head is £24.74 across the six festivals researched.
- But spend varies considerably across the festivals, being closely related to how long attendees stay at a festival.
- Attendees overwhelmingly think that the origin of food is important, though may not always have the opportunity to buy Welsh food in their normal shopping.

Trends within the sector

- Some festivals are broadening their offer into non-food areas and may be concerned with a range of issues, including local economic development, promoting local culture and tourism.
- By contrast, other festivals may operate more simply as a showcase for local producers.
- Attempts to form an Association of Food Festivals have stalled due to a lack of administrative capacity, the desire of some festivals to maintain their autonomy, and the differing strategic directions of the festivals.

- There may be potential for greater collaboration between groups of festivals on certain issues, although this is now likely to require third-party facilitation.

Economic impact of food festivals

- The money spent by organisers to stage food festivals boosts the economy by an estimated £1.4m.
- Attendees spend an estimated £3.82m at food festivals (based on reported spend at the festivals visited).
- The visitors attracted to food festivals from outside Wales are estimated to bring an additional £3.7m to the Welsh economy (based on reported spend by visitors at the festivals visited).
- The value of food festivals to the exhibitors in indirect sales may be substantially more than the sales made at the events (indirect sales are estimated at £17m, based on the perceptions of exhibitors).

Important themes from the report

Most exhibitors are micro-businesses and may only attend local food festivals

Most exhibitors are self-employed, with the remainder employing only small numbers of staff. Small producers appear to focus on developing local markets, and many follow an events-based strategy but avoid travelling to events outside of their target area in order to minimise costs. In some cases, direct assistance to small producers to overcome the costs of attending festivals outside of their immediate locality may warrant some consideration, if appropriate, towards their business strategy.

The strategic importance of food festivals for exhibitors may go beyond direct sales

In addition to selling their goods, exhibitors see festivals as an opportunity to promote and market their business and perform research and development activities. However, there is variation in the extent to which exhibitors engage in these activities and there may be an opportunity to promote best practice in some of these areas (e.g. making sure that new customer details are recorded for future contact, testing, and gathering feedback around marketing (such as packaging, product names, price points)).

Food festivals effectively promote Welsh produce

Results from the evaluation have suggested that both the festival organisers and exhibitors effectively promote Welsh produce, and some exhibitors have given examples of how they've tried to explicitly associate their goods with the 'Welsh produce' brand. There are also some natural opportunities to promote the Welsh language, e.g. assigning Welsh names to food and drink brands may underline their authenticity. Attendees overwhelmingly value knowledge about the origin of their food, but are not necessarily representative of the wider public in this regard. There is also evidence that improving choices and access to Welsh food and drink when attendees return home from the festivals may be important.

Food festivals can cut across different policy areas

The contribution of some food festivals cuts across several government departmental areas to include economic development, tourism, regeneration, and community cohesion. There is a compelling economic justification for supporting food festivals, and arguably a cultural one too, but this argument is, in some cases, made most powerfully by acknowledging the broader role that the festivals may play. From the perspective of the Food Division, the Welsh food and drink sector may be supported at different points of the supply chain, from providing direct assistance to producers (supply-side interventions) to promoting demand for Welsh produce (demand-side interventions). Food events perhaps represent a unique type of intervention in that they sit neatly between the supply- and demand-side interventions, but are not the only strategy for supporting the food and drink market.

1 Introduction and Method

1.1 Introduction

The Welsh Government's Food Division (FD) provided grant funding from the Welsh Government's central budget to 25 food festivals in Wales throughout 2015. Grant funding has been provided to Welsh food festivals since 2002. The evaluation describes food festivals from the perspective of festival organisers, exhibitors and attendees. The research presents the findings from two large surveys to exhibitors and attendees, as well as findings from more qualitative interviews with festival organisers. The research also looked at the application forms and business plans submitted to the Welsh Government.

The expectations for the evaluation were outlined as being:

- to visit six of the Welsh Government-funded food festivals
- to evaluate the impact of Welsh Government-funded food festivals on the food and drink sector in Wales, including an assessment of value for money
- to undertake a detailed review of funding applications, and supporting documentation, identifying trends and providing statistical analysis
- to complete a survey with a sample of producers attending all Welsh Government-funded food festivals
- to record site visits with brief written reports on the festivals attended
- to clearly measure the grant support provided against the criteria set and the applications submitted.

The evaluation also provides evidence of how the Welsh Government funding of food festivals contributes to the actions outlined in the Action Plan "Delivering Growth" specifically in regards to:

- raising the profile of Welsh food (e.g. Action Point 36)
- taking a co-ordinated approach to developing the sector (e.g. Action Points 33 and 43)
- providing learning, skills development and networking opportunities (e.g. Action Points 4, 5 and 21)
- supporting innovation and developments of products/markets (e.g. Action Points 8, 20 and 31)
- promoting the Welsh language (e.g. Action Point 11)
- supporting small businesses in key food sectors (e.g. Action Points 14, 19 and 23)
- improving access to food (e.g. Action Point 45).

The evaluation in itself contributes baseline data and provides insight into market development strategy, as stated in Action Point 12.

The report is structured as follows:

Chapter 2 describes Welsh Government support for food festivals and gives feedback on the application process.

Chapter 3 presents the findings from the exhibitor survey, reviewing the background and profile of exhibitors and investigating their perceptions and opinions of the festivals that they have attended.

Chapter 4 presents the findings from responses to a face-to-face survey of attendees at six food festivals. This includes a discussion of catchment areas, the motivation of attendees to come to the festivals, how they rated different elements of their experience, and how much time and money attendees spend at the festivals.

Chapter 5 discusses some of the trends which appear to be emerging in the sector, describing one way in which the sector experiences diversification and some of the barriers and opportunities for collaborative working.

Chapter 6 provides guiding estimates of the economic impact arising from the operation of food festivals in Wales.

Chapter 7 summarises the key findings and provides some narrative on the themes which have emerged.

1.2 Methodological Approach to the Evaluation

A suite of methods have been applied to gather evidence for this evaluation:

1. Consultations with key representatives within the Welsh Government.

2. Telephone interviews with 25 food festival organisers and other stakeholders within the sector.

3. A survey of a sample of 250 producers that exhibited at the food festivals in 2015.

4. A survey of 909 attendees at the six food festivals attended by Wavehill's research team. The festivals attended were:

    - Abergavenny Food Festival
    - Beaumaris Food Festival
    - Conwy Food Festival
    - Newport Food Festival
    - St Fagans Food Festival
    - Narberth Food Festival.

    An individual summary for each of these festivals has been included as an annex to this report.

5. Analysis of all evidence gathered for the evaluation, including an economic impact analysis using UK Government-compliant[4] methods to estimate the net additional impact arising from food festivals.

In identifying themes and trends, the narrative of the report, at times, also draws on previous evaluations of Welsh Government-funded food festivals undertaken by Wavehill. Over the last three years, 77 interviews have been undertaken with festival organisers/stakeholders, 2,229 interviews have been undertaken with festival attendees, and 640 exhibitors have been interviewed.

[4] See, for instance, HM Treasury's Green Book, the Magenta Book, and guidance associated with the Impact Evaluation Framework approach created by BIS for Regional Development Agencies.

2 Supporting Food Festivals

This chapter provides a brief overview of the policy context for supporting food festivals before describing funding levels and the application process. The chapter concludes by presenting feedback from food festival organisers, reflecting on their experiences of applying for funding.

Summary

- Welsh Government support for food festivals is underpinned by the Action Plan "Delivering Growth." The Welsh Government aim to grow the food and drink sector by 30 per cent to £7bn by 2020
- Twenty-five food festivals received support in 2015, with Welsh Government grant value ranging from £1,700 to £15,225
- The level of funding available for food festivals and the volume of funding applications for food festival support have continued to decline
- A tiered application system was introduced in 2015 which reduced the paperwork requirement for small grant awards and allowed larger festivals to apply for bigger sums
- There is a perception that the application process suffers from tight timescales, leading to criticism from applicants
- Some of the organisers of large festivals do not feel that the application procedure adequately reflects the value of their festival outside of the food sector

2.1 Policy Context

The key policy document which underpins the Food and Drink Grant Support Scheme is the Action Plan “Delivering Growth”, henceforth referred to as the ‘Action Plan’. This document describes the strategic importance of the food and drink sector and states that the Welsh Government aim to grow the sector by 30 per cent to £7bn by the year 2020. As of 2014, the size of the sector, including the supply chain and retail, is given in this document as:

- 23,300 businesses
- £17.3 billion in turnover
- £4 billion in GVA
- 170,000 jobs[5]

Support of food festivals has been seen as one way in which the Welsh Government may enable growth in the sector.

Welsh food is also seen as a potentially strong brand which can be promoted to tourists. The *Food Tourism Action Plan for Wales (2015-2020)*[6] builds on the previous 2009-2013 action plan but targets the five key areas identified in the Visit Wales ‘Partnership for Growth’ Strategy for Tourism (2013–2020)[7]: Promoting the Wales brand, developing the product and people, place building and increasing performance. In general terms, the aim is to raise awareness of Welsh Food and Drink with an eventual ambition in 2020 to have fully integrated food tourism into Visit Wales’s activities and to make Wales a quality Food Tourism destination.

[5] From the Welsh Government’s own analyses consistent with the priority sector statistics release

[6] Welsh Government, 2014, *The Food Tourism Action Plan for Wales 2015-2020*: http://gov.wales/docs/drah/publications/Tourism/150310food-tourism-action-plan-en.pdf

[7] http://gov.wales/topics/tourism/developmentl1/partnershipforgrowth/?lang=en

2.2 Funding Levels

The Welsh Government have contributed grant funding to food festivals since 2002, initially through core Welsh Government Food Division funding and then via the Supply Chain Efficiencies Scheme (through the Rural Development Plan for Wales) for a three-year period between 2009 and 2012, before reverting back to core Welsh Government Food Division funding.

The completion of the Supply Chain Efficiencies Scheme, combined with wider public sector funding constraints and a strengthening of the desire (as evidenced in Welsh Government policy) for festivals to be encouraged to operate on a financially sustainable basis, has led to significant restrictions on grant aid. The total level of funding has therefore decreased over recent years and the 2015 figure of £137,571 represents a 25 per cent reduction of the level awarded in the previous year (£184,311), and is less than half the amount approved in 2012 (£327,444).

The grants received by festivals in the 2015 round of funding ranged from £1,700 to £15,225. The average (mean) award across festivals was £5,503, although the ‘typical’ award (median) was slightly below this at £5,000, reflecting the skew caused by a small number of larger awards (for example, two large flagship national events secured grants of over £14,000).

The rate of intervention (the proportion of festival costs covered by Welsh Government funds) ranged from 4 per cent of total costs to 42 per cent, which, in part, reflects the extent of diversity in the scale of costs associated with each food festival. The reduction in the upper level from 61 per cent in 2014 reflects a reduction in the amount of Welsh Government funding available to smaller festivals.

2.3 Application Process

Although the total level of funding has decreased over recent years, demand for this funding from food festival organisers has remained high. The volume of applications for grant aid in 2015 (28 applications) was the same as in 2014, though lower than the 2013 figure (33 applications). As shall be discussed in Section 2.4, the number of applications received in particular years is not necessarily a perfect measure of demand, as other factors (such as the length of the application window) may also play a role.

There was a change in the application process in 2015. Firstly, a tiered approach was brought in, whereby food festivals wishing to apply for small amounts of funding (up to £5,000) could apply to the lowest tier of funding. This lower tier placed fewer paperwork requirements upon the applicant and, in doing so, went someway to responding to the feedback from food festival organisers in previous years that the process could be overly bureaucratic for cases in which the eventual reward was relatively small. This had particularly been a concern for the smaller festivals which lack full-time staff, and are frequently volunteer-run. In 2015, opting for the lower tier negated the requirement to provide a full business plan and other supporting documents.

The upper tier, by contrast, required this additional business plan documentation but allowed food festivals to apply for a larger amount of funding (up to £25,000) than had previously been possible, again going someway to remedying the perceived imbalance between the demands of the application process and the reward received. There was also a middle tier between these two, predominately designed with mid-size specialist festivals in mind (e.g. festivals focusing on a particular type of food) in which awards of up to £10,000 could be applied for. There was not a high take-up for this second tier, although one award was given to a seafood festival.

Table 2.1: Summary of Welsh Government funding of food festivals in the 2015 funding round by tier

Tier	Number of festivals supported	Average (mean) grant approved
1	22	£ 4,483
2	1	£ 9,335
3	2	£ 14,803
All	**25**	**£ 5,503**

As part of the application criteria:

- for Tier 1 and Tier 2 applicants – 75 per cent of all exhibitors must be food and drink exhibitors, of which 70 per cent must be Welsh food and drink exhibitors.

- for Tier 3 applicants – 80 per cent of all exhibitors must be food and drink exhibitors, of which 65 per cent must be Welsh food and drink exhibitors.

As in previous years, the application process has placed emphasis not only on promoting Welsh food and drink but also on encouraging innovation within the sectors, in line with the Action Plan (see Action Point 20, for example). Looking at the submissions across the last three years, there appears to be some progress in this direction. Specifically, information provision to visitors about Welsh food and live cookery demonstrations are becoming a more frequent element of festivals, according to the proposals described in the application forms.

2.4 Perceptions of the Application Procedure

Interviews with food festival organisers suggest that the introduction of the tiered system, and the associated reduction in paperwork and raising of the funding ceiling, has been well received. However, these improvements have been, to some extent, overshadowed, in the minds of festival organisers, by the small time window in which applicants have to make their submissions.

Details of funding and application forms were emailed out to all previous Food Festival Applicants and enquirers on 3rd March 2015 and full details of the application timing, process and application forms were also published in the appropriate section of the Welsh Government website, and also released to Welsh regional press.

In order to allow organisers more time to submit applications for 2015, two application windows were launched: the first with a deadline for applications of 18th March 2015, and a second window for applications from the 27th of April to the deadline for applications of 15th May 2015. The earlier window had been introduced to allow those early food festivals taking place in April and May an opportunity to submit applications.

Organisers could therefore potentially have had 10 weeks to submit their application, though this may seem far less if the first window had been missed. It should be noted, however, that smaller festivals tend to run on a skeleton staff (or frequently volunteer cover), particularly at times of the year which fall outside of the planning and delivery period for the festival, and therefore would still find a longer period beneficial.

The preferred approach, raised by many of the organisers, is to be able to apply for funding across more than one year. Not only would this provide the security that many of the small festivals do not have, but would also reduce the need to quickly respond to funding deadlines each year and effectively further reduce the paperwork requirement as well. Ultimately, the Food Division are themselves working within constraints in this regard, as their annual funding is contingent on Welsh Government budget approval, which prevents both funding over multiple years and the allowance of as long an application period as organisers would ideally want.

There was a sense from some of the festivals that the criteria were becoming less relevant to them, as their event has developed. There are two elements to this. Firstly, the breadth of some of the festivals can go beyond food and drink, and organisers therefore feel that the criteria recognise only part of their contribution. The contributions of some festivals may cut across several government departmental areas to include economic development, tourism, regeneration, and community cohesion. Secondly, although the raised funding ceiling is undoubtedly welcome, the grant received still represents only a small fraction of the total costs for the larger festivals. Whilst the contribution is, nevertheless, considered to be very useful, some organisers of the largest festivals must consider the 'costs' of applying against the benefits, particularly where the criteria which come with the funding are aimed at keeping the events tightly focused on food and drink, which may not be aligned with the strategic direction of some festivals.

2.5 Summary

In summary, an early application window and tiered application system were introduced in 2015 to try to ease time and paperwork pressures on festival organisers, but representatives from some of the smaller festivals still found it challenging to meet the application deadline. Some of the representatives of some festivals felt that the application criteria were too narrowly focused on the food sector to fully capture the value of their event. Welsh Government funding of food festivals has reduced in recent years, due to policy decisions designed to encourage food festivals onto a self-sustainable footing and underlined by tightening of the national (Welsh) budget. It is likely that this trend will continue and the imperative for food festivals to become self-financing (or to find alternative sources of grant funding) will remain.

3 Food Festival Exhibitors

This chapter explores feedback from a survey of 250 exhibitors at Welsh Government-funded food festivals in 2015, reviewing the background and profile of exhibitors and investigating their perceptions and opinions of the festivals that they have attended.

Summary

- Monitoring data provided by the Welsh Government estimates that 930 different organisations exhibited at Welsh Government-funded food festivals in 2015
- Seventy-six per cent of those exhibiting at the festivals are based in Wales
- Almost two-thirds (64 per cent; 597/930) of organisations exhibited at just one festival
- Of the 250 exhibitors surveyed, more than 39 per cent were less than four years old
- Ninety-two per cent of the surveyed exhibitors had fewer than 10 employees and 40 per cent had a turnover of less than £25,000
- Around four in five respondents (81 per cent) actively promote Welsh food and drink at food festivals
- Half (50 per cent) of respondents said that attending Welsh food festivals had influenced the development of their products

3.1 Sampling and Survey Approach

The evaluation team collated and analysed available exhibitor lists from food festivals which had received Welsh Government funding. This identified that:

- there are an estimated 930 different organisations that exhibited at Welsh Government-funded food festivals in 2015 (slightly lower than the estimated number of exhibitors at the 2014 funded festivals (n=985)).

- seventy-six per cent of those exhibiting at the festivals are based in Wales (73 per cent in 2014, 77 per cent in 2013).

- almost two-thirds (64 per cent; 597/930) of organisations exhibited at just one festival (similar to the 2014 and 2013 proportions of 66 per cent and 68 per cent respectively), whilst around 20 per cent (182/930) exhibited at three or more Welsh Government-funded food festivals.

Prior to sampling and surveying, all non-Welsh producers and those whose location was not recorded (equating to 220 exhibitors) were excluded from the sampling frame. A random sample was then drawn from the remaining 710 exhibitors, who were then contacted and asked to complete the telephone survey.

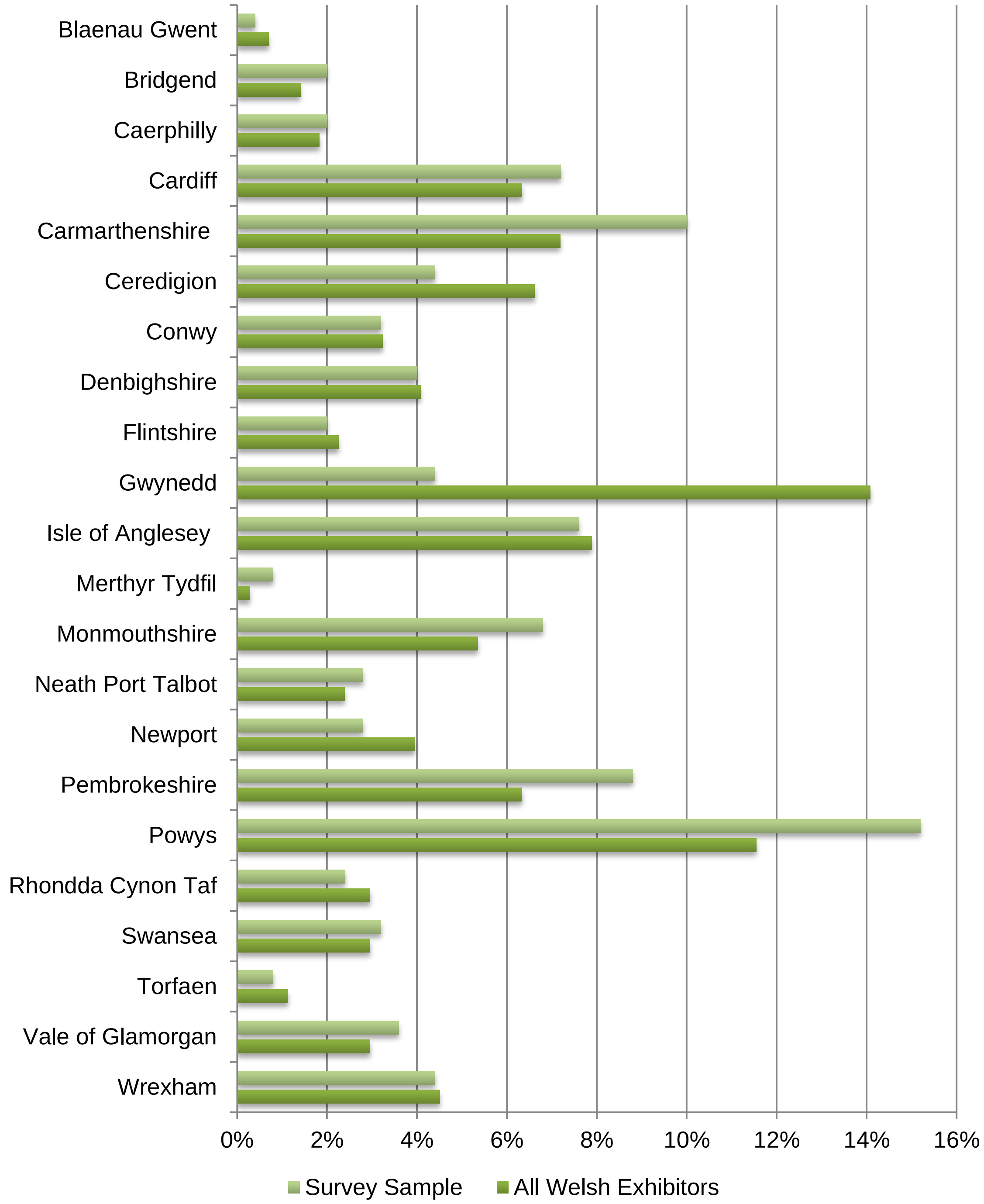
3.2 Survey Findings

3.2.1 Exhibitor profile and characteristics

Figure 3.1 illustrates the geographical spread of the exhibitors who participated in the survey, compared with the profile of all Welsh exhibitors. The chart demonstrates that the survey sample is broadly representative, although Gwynedd is significantly underrepresented. However, it should be noted that the sample may be partially skewed in one respect, as the survey of exhibitors was necessarily begun before all of the festivals had taken place, due to the timescales given for reporting requirements. Festivals which took place over the Christmas period, for example, could not be included.

The chart illustrates that exhibitors from the large, predominantly rural counties of Wales are most prevalent at Welsh Government-funded food festivals. However, it is an oversimplification to only think of exhibitors as coming from rural areas, with 6 per cent based in Cardiff alone. What can be said is that Torfaen, Merthyr Tydfil, Blaenau Gwent, and Bridgend in the South Wales Valleys area seem to have particularly low numbers of exhibitors.

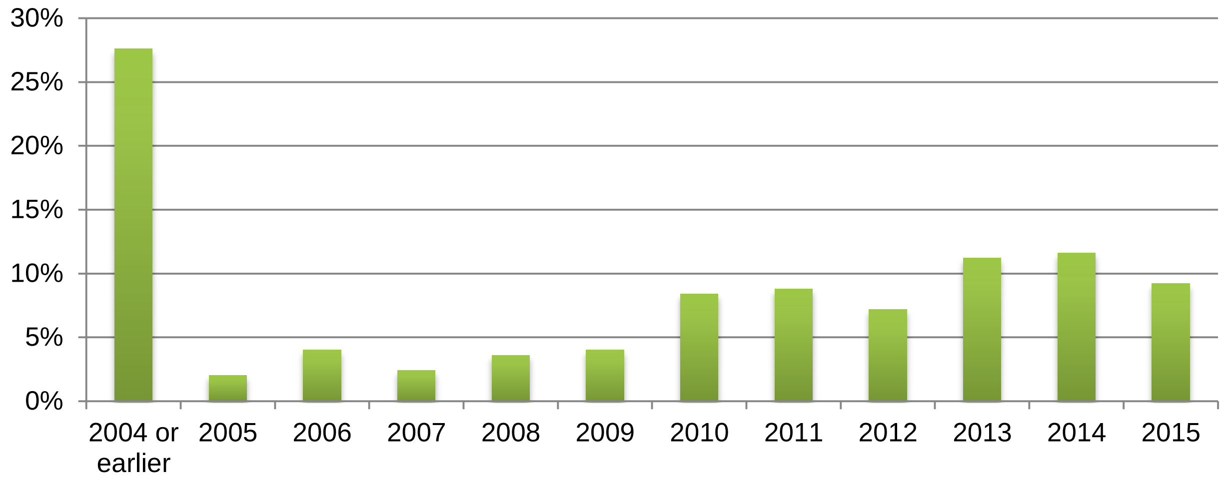
Figure 3.1: Location of Wales-based food festival exhibitors by local authority



n = 710 (All Welsh Exhibitors) and 250 (Survey Sample)

All exhibitors who participated in the survey were asked how long they had been trading. As shown in Figure 3.2 below, over a quarter (28 per cent; 69/250) are well established, having been trading for 10 years or more, whilst almost a third (32 per cent; 80/250) are less than three years old (the same figure was 31 per cent in 2014 and 33 per cent in 2013). The age distribution is very similar to that presented in the surveys conducted in 2013 and 2014, and reinforces the role that food festivals play in supporting new businesses and promoting opportunities to test trade or to trial new products.

Figure 3.2: In what year did your business start trading?

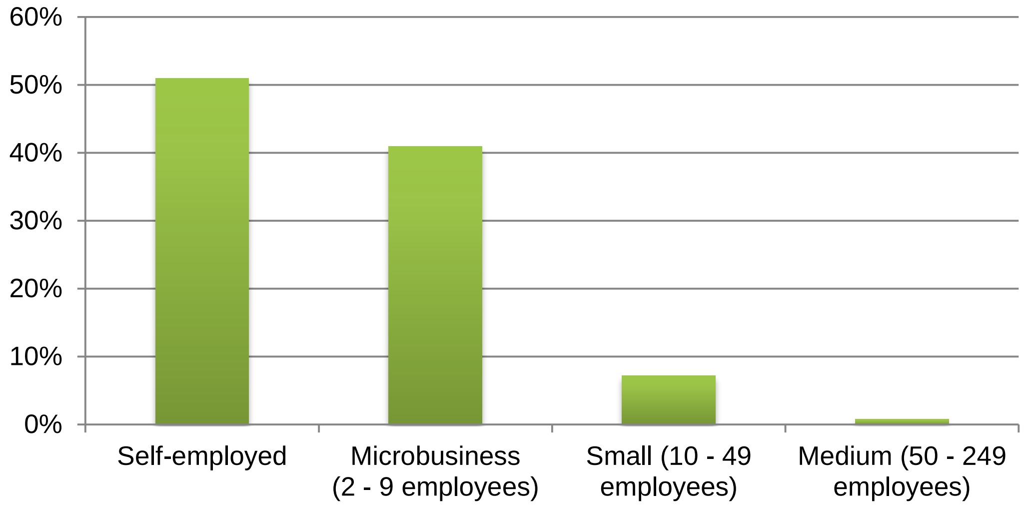


n=250

Businesses were also asked to provide details of the number of staff that they employed. The average (mean) number of full-time equivalent (FTE) permanent staff per exhibitor is 3.9.

However, Figure 3.3 demonstrates that just over half (51 per cent; 127/249) of all exhibitors surveyed are self-employed traders employing no additional staff, and 92 per cent have fewer than 10 FTE staff (the same figure was 90 per cent in 2014 and 90 per cent in 2013). The largest organisation employed a total of 60 FTE staff. Food festivals therefore predominantly support micro-businesses, though the distribution can also perhaps be seen as reflective of the size of businesses in Wales in general, where micro-businesses account for almost 95 per cent of all businesses in Wales (ONS, 2015).

Figure 3.3: How many people do you employ normally?

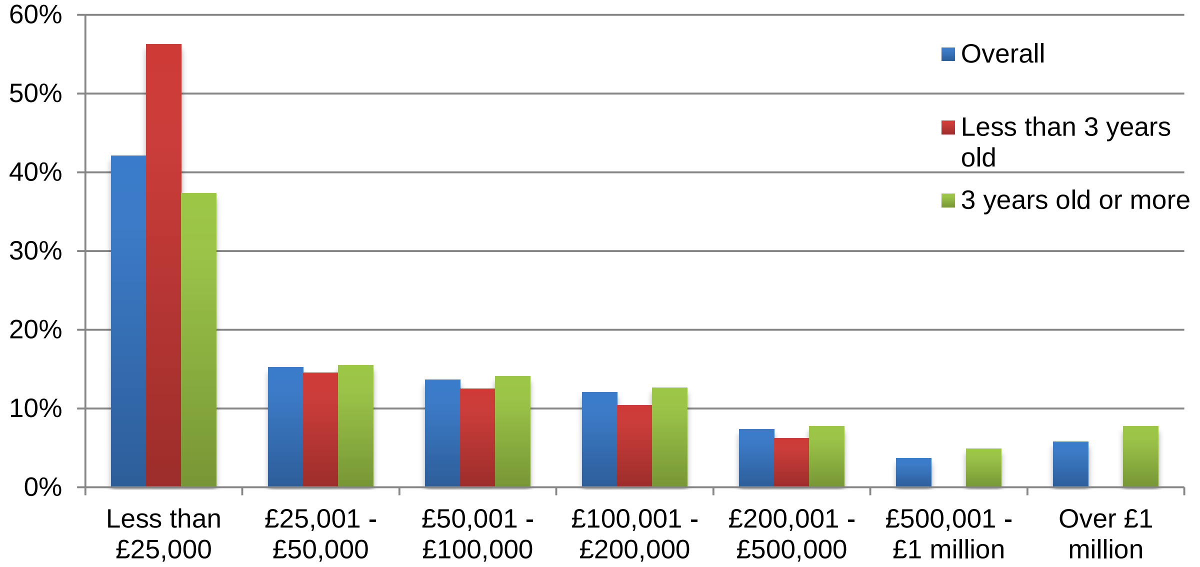


n=249

Respondents were asked to state their business turnover for the most recent financial year. Exhibitor turnover is detailed in Figure 3.4 below, and comparisons for younger businesses (established since 2013) with those that are at least three years old are also shown. Just over 40 per cent (80/190) of all exhibitors surveyed have a turnover of £25,000 or less, rising to 56 per cent, and almost three-quarters of all exhibitors surveyed (71 per cent; 135/190) have a turnover of £100,000 or less.

As might be expected, the younger exhibitors are more likely to feature in the lowest turnover bracket and less likely to feature in the highest turnover bracket. The chart suggests that a third of young traders in the lowest turnover bracket might be expected to move out of this category over time. Whilst this could be caused by the growth of young business as they mature, business deaths and/or a proclivity for business to cease exhibiting as they mature could theoretically also be factors.

Figure 3.4: What was your annual turnover for the previous financial year?



n=190 (excludes businesses that have not completed a financial year, responded with 'don't know', and those who refused to answer)

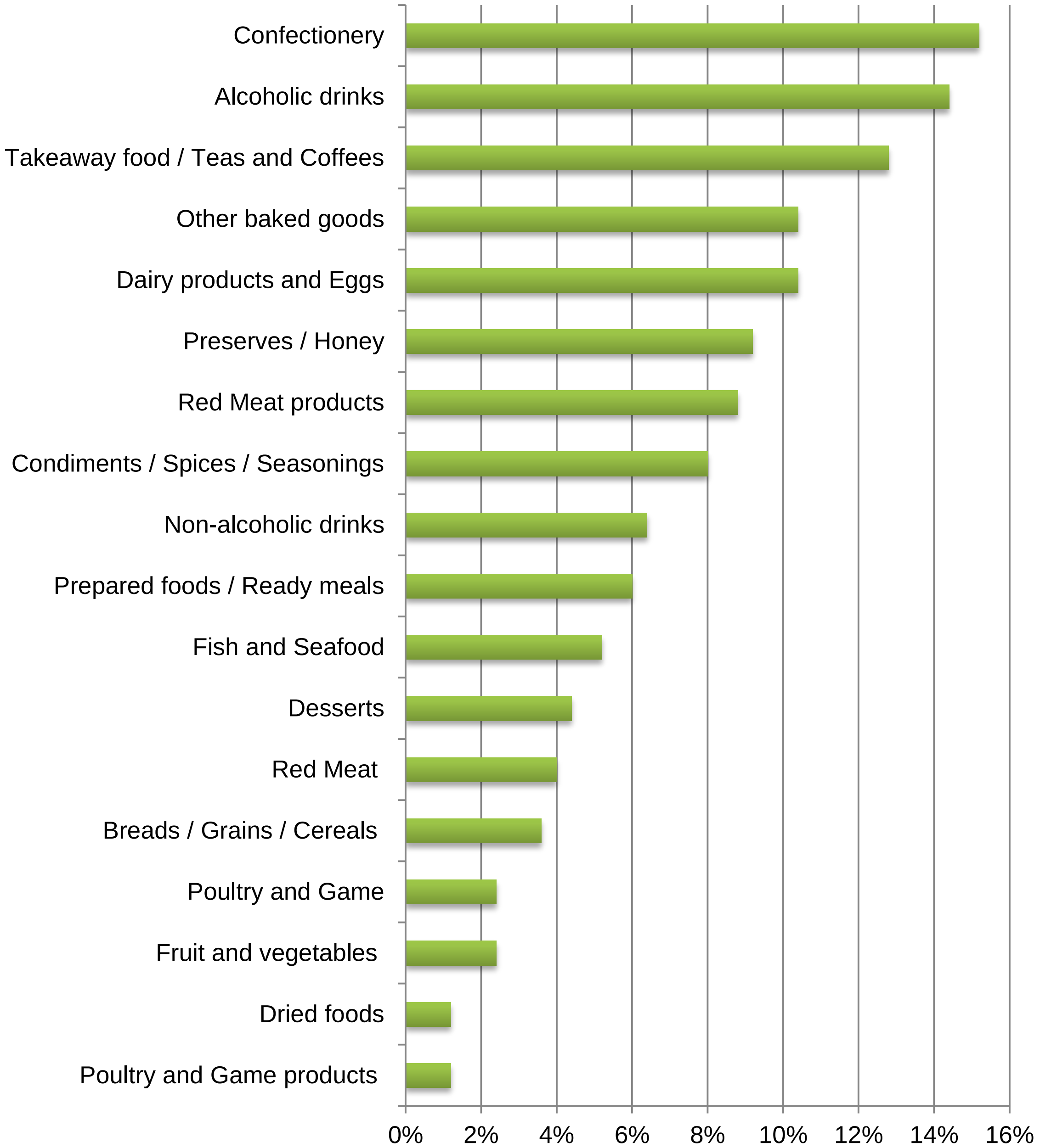
The prevalence of young micro-businesses demonstrates the role that food festivals can play in developing SMEs (small and medium-sized enterprises) in the sector, which is highlighted as a strategic importance by the Action Plan (see Action Points 8, 14, 19 and 30, for example).

The range of products sold by exhibitors is shown in Figure 3.5 below. As in previous years, takeaway foods, confectionery and alcoholic drinks are amongst the most prevalent products sold at food festivals. This is largely a consequence of these types of stalls featuring at every festival, whereby exhibitors of particular produce (e.g. red meat, seafood) are more likely to feature at some festivals but not others. This is, in part, due to the location of the festivals (particularly in the case of seafood) but is also determined by the facilities on offer (e.g. where refrigeration is required).

It is also noteworthy that ‘food to go’ appears to have climbed the list in recent years. The 2014 evaluation saw an increase in the proportion of exhibitors selling confectionery items and alcohol and these figures remained high in 2015. Takeaway food has always accounted for a relatively high proportion of exhibitors and there is now a suggestion that other exhibitors are beginning to make their produce available in takeaway form to take advantage of this trend. For example, the proportion of exhibitors offering red meat products (which may include burgers and sausages) has risen from 4 per cent of exhibitors at the 2013 festivals to 6 per cent in 2014 and 9 per cent in 2015. Similarly, prepared food/ready meals have risen from 1 per cent of exhibitors at the 2013 festivals to 5 per cent in 2014 and 6 per cent in 2015. By contrast, more traditional fare, such as fruit and vegetables, poultry and game, and unprocessed red meat remains, has seen no such growth and, in some cases, appears to have declined (although the year-on-year figures are liable to some random variation when dealing with small percentages).

This is consistent with prevailing trends in the sector, but may have consequences as to how Welsh Government supports the sector. Meat, dairy, fisheries, bakery, and poultry/eggs are amongst the priority sub-sectors, according to the Action Plan (see Action Point 14), along with ready-to-heat/eat packaged groceries and drinks. Whether or not Welsh food is bought in its unprocessed form or as ‘food to go’ (either for consumption at the point of purchase or with minimal preparation at home) may not in itself be critical as long as the trend is recognised and support tailored accordingly. Indeed, the added value that comes from extending the supply chain, and the relatively high added value of food processing, potentially increases the economic contribution of the sector.

Figure 3.5: What goods do you sell at food festivals?

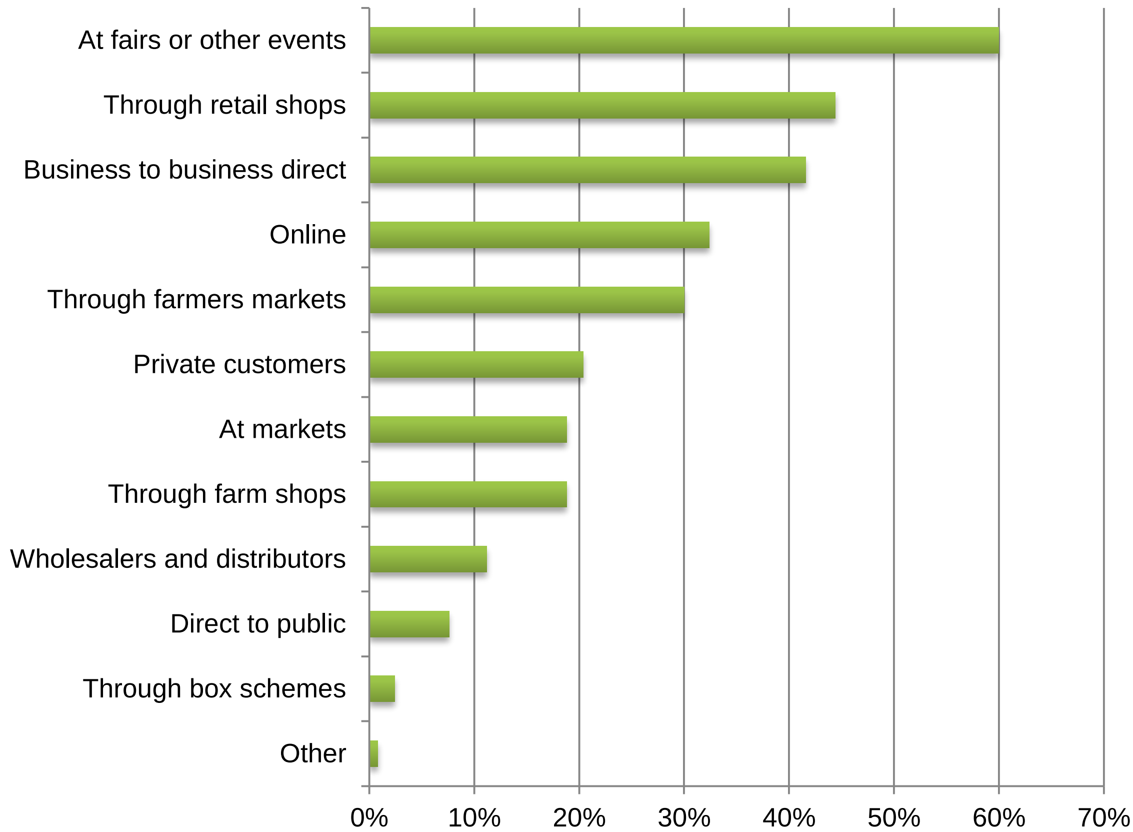


n=250

NB: Totals exceed 100 per cent, since exhibitors were able to select multiple options.

Exhibitors were asked how they normally sell their goods outside of food festivals. Figure 5.6 illustrates that exhibitors most commonly sell at fairs or other events, although significant proportions sell their goods through retail shops or directly to other businesses, such as food and drink establishments. That 60 per cent of exhibitors sell their goods at other fairs and events is of particular interest, given the previous finding that two-thirds of exhibitors appear at one food festival. It suggests that although most exhibitors do not follow the food festival 'circuit' around the country, their appearance is, nevertheless, part of a wider event-based strategy. Perhaps the simplest explanation for this is that exhibitors have a preference to remain within their local area. This also seems consistent with the findings that exhibitors are quite small businesses (which lack the means to travel around the country) and also quite young businesses (which may look to cement a local base before expanding outwards).

Figure 3.6: Outside of food festivals, how do you normally sell your goods?



n=250

NB: Totals exceed 100 per cent, since exhibitors were able to select multiple options.

The prominence of exhibitors pursuing a clear event-based strategy has become increasingly more apparent over the last three years. In the 2013 festivals, just 25 per cent of exhibitors sold their goods at fairs or other events, whilst the figure was 44 per cent in 2014 and was 60 per cent in 2015. Interestingly, though, the proportion of exhibitors specifically appearing at farmers' markets has remained quite constant during this time period, so the increase is perhaps with exhibitors appearing at non-food events. The 2015 results also saw an increase in the proportion of exhibitors who sold their goods online (32 per cent, an increase from 26 per cent in the 2014 figures). The final noteworthy trend is a steady increase in exhibitors selling goods through retail shops, which 44 per cent of exhibitors did in 2015, up from 41 per cent in 2014 and 31 per cent in 2013.

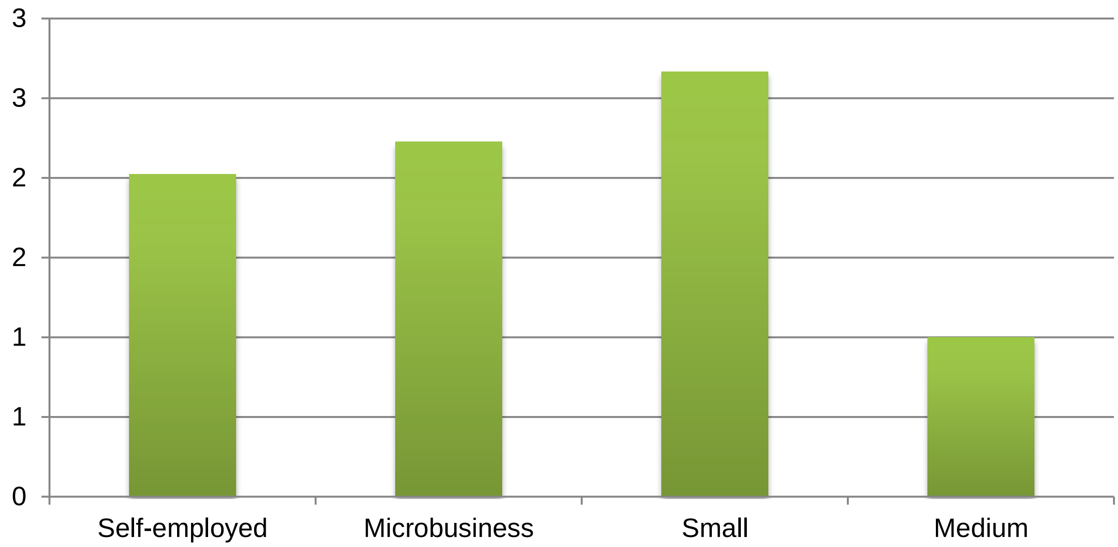
3.3 Attendance at Food Festivals

Although two-thirds (64 per cent; 59/930) of all exhibitors attended just one festival, further analysis shows that around 20 per cent (182/930) of exhibitors actually attended three or more food festivals. Therefore, whilst it may be true to characterise most exhibitors as businesses which are anchored to a particular locality, this is a slightly oversimplified picture. Indeed, some exhibitors have attended more than 10 of the festivals, suggesting that there may be a small subgroup of exhibitors who do follow the food festival 'circuit' to some extent.

Figure 3.7 below shows the average (mean) number of food festivals attended by exhibitors of different sizes. This shows that larger exhibitors are generally more likely to attend more festivals. This would seem to concur with the hypothesis which suggested that the localism of many exhibitors is a *contingent* characteristic which may be simply symptomatic of their lack of resources (either financial or human) to engage with good opportunities in other parts of the country, for example.

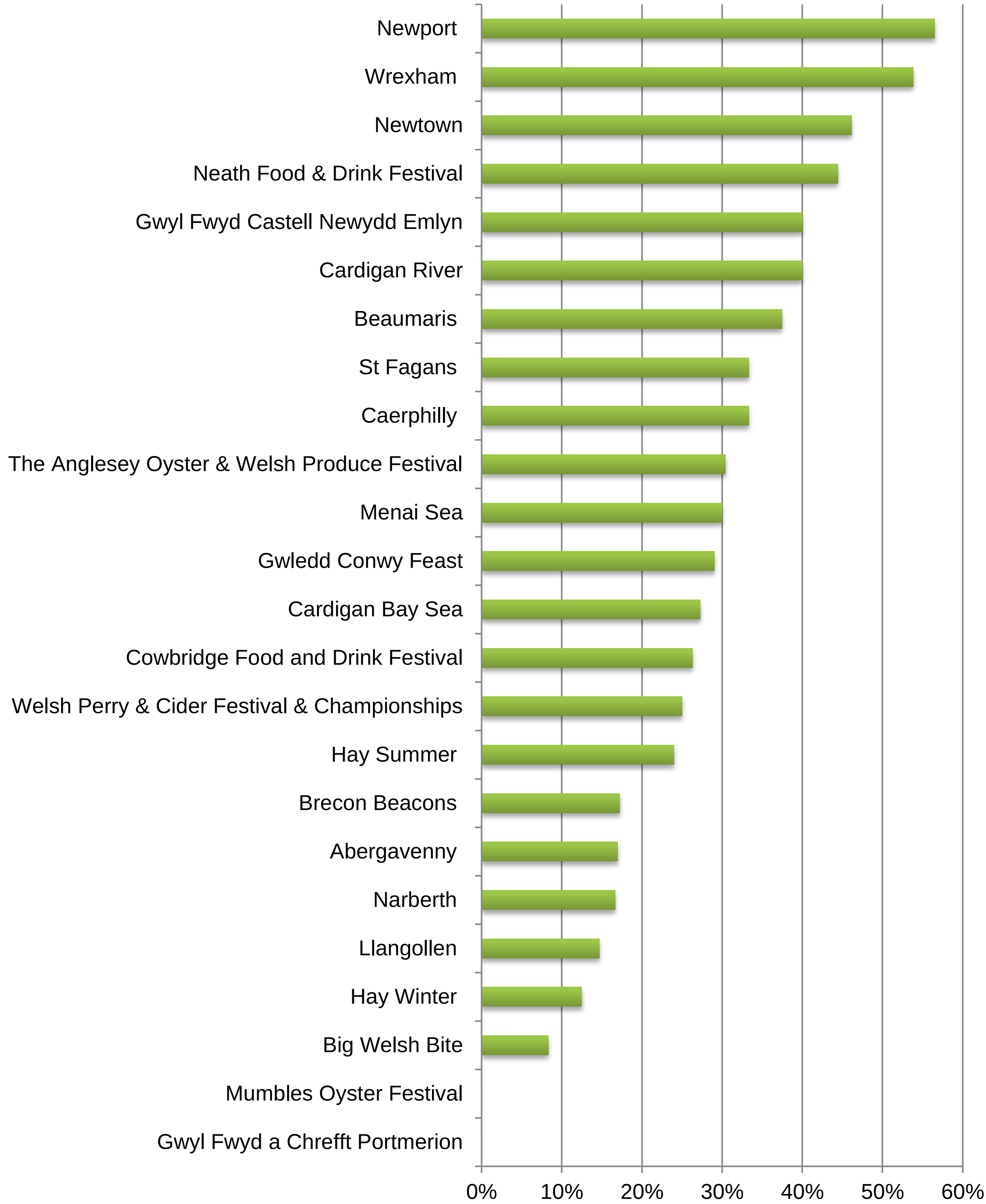
In interpreting Figure 3.7 below, note that medium-sized exhibitors represent just 1 per cent of the sample and, therefore, the figures displayed for this group may be prone to a substantial sampling error.

Figure 3.7: Average number of festivals attended by size of business



In order to ascertain whether younger businesses may be attracted to any particular food festival, attendance can be analysed for those traders less than three years old. As shown in Figure 3.8 below, patterns of attendance would suggest that Newport and Wrexham may have a particular appeal for more recently established businesses, as more than half of the respondents who attended these festivals were less than 3 years old. Note that there is likely to be a degree of error within some of these figures, as the numbers of exhibitors interviewed who attended a particular festival may be quite small. Nevertheless, the general principle that some festivals are more likely to appeal to new, rather than established, exhibitors appears to be true, although the reasons for this are unknown.

Figure 3.8: Proportion of surveyed exhibitors at each festival that are under three years old

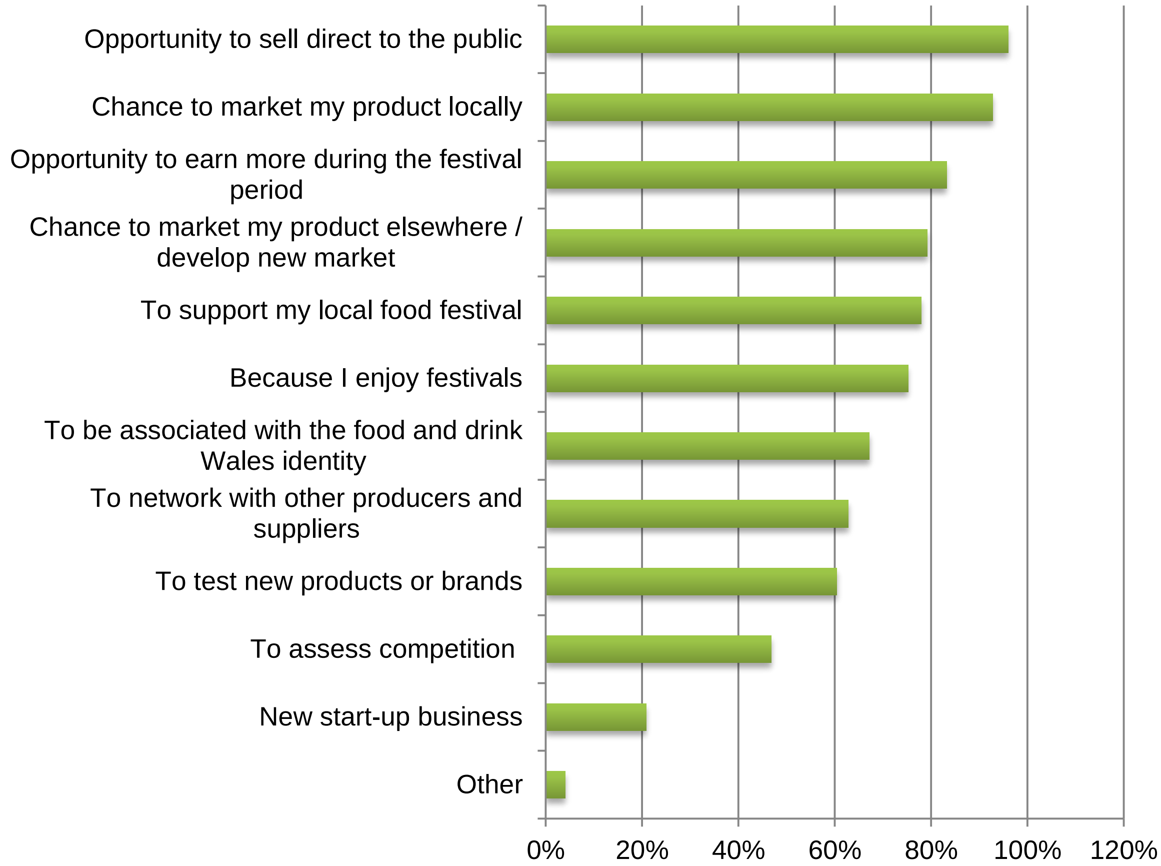


n=250

Exhibitors were asked to state their reasons for attending food festivals. The prompted responses are shown in Figure 3.9 below. The results are similar to the findings from the 2014 survey, illustrating that there are a host of reasons why exhibitors decide to attend food festivals. Opportunities to make direct sales and to promote products locally were the most frequently given answers. That the most common motivator was to make sales to the public would be expected, but it is notable that 93 per cent of exhibitors attended to market their products. This suggests that the value of food festivals to exhibitors may not be adequately encapsulated simply by looking at direct sales, but rather that exhibitors perceive there to be some further value from their attendance which is presumably expected to eventually manifest itself in additional sales. Although placing a value on these indirect sales can be problematic, this cannot be completely ignored when estimating the economic value of food festivals and is considered during Chapter 5. The Action Plan[8] makes multiple references to supporting research, development and innovation in the sector (e.g. Action Point 20) and helping businesses to develop markets (e.g. Action Point 31).

[8] Welsh Government, 2014, *Towards Sustainable Growth: An Action Plan for the Food and Drink Industry 2014-2020:* http://gov.wales/docs/drah/publications/Tourism/150310food-tourism-action-plan-en.pdf

Figure 3.9: Which of the following are the reasons why you attend food festivals?



n=250

While there was little variation in responses across new and more established businesses, the owners of new businesses were more likely than average to state that they attended food festivals in order to market their products elsewhere or develop new products; 91 per cent of respondents whose business was less than three years old cited this as a reason for their attendance, compared with 79 per cent overall. There was also little variation in responses based on organisational turnover, although smaller businesses (with a turnover of less than £25,000) were most likely to report that their attendance at food festivals gave them an opportunity to earn more during the festive period.

3.3.1 Promoting Welsh Food and Drink

The surveyed exhibitors were asked whether they actively promote and sell Welsh food and drink at the festival(s), with 81 per cent (203/250) confirming that they do. This result is similar to that found in the 2014 survey of exhibitors, where 82 per cent reported that they actively promote and sell Welsh food and drink. Interpreting this question can be difficult. The temptation is perhaps to jump to the conclusion that ~80 per cent of exhibitors promote and sell their goods explicitly as 'Welsh produce'. Whilst this may well be the case, it is arguable that exhibitors who happen to sell Welsh produce, but do not draw on this to promote and sell their goods, could also have answered in the affirmative. That said, the open comments left by respondents as a means of explaining their answer do, for the most part, seem to point to the former, rather than the latter, interpretation.

> *"We've got a dozen of our own blends of loose leaf tea and we give them Welsh names and it's on our signage."*

> *"The produce we make is made in Wales and most of the ingredients are Welsh, I promote the fact we make the ice cream ourselves and use Welsh milk."*

> *"The labels of our products are on a Welsh theme and are bilingual. The Welsh flag is incorporated into decor and we have little red dragons as props on our stall where possible."*

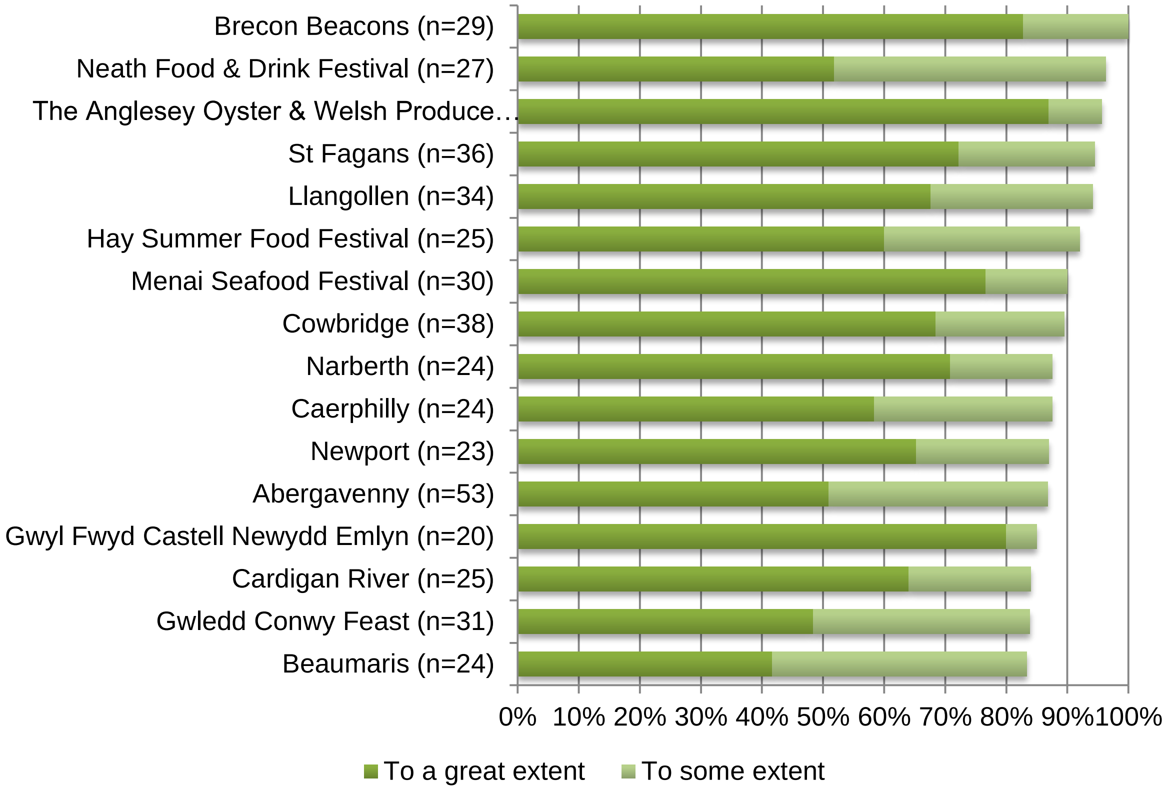
> *"It's all labelled with the source of where the flour comes from and there are leaflets about the business for people to take with them."*

It seems that many exhibitors did recognise that the Welsh brand can be used as a valuable trademark of sorts. The discussion in the Action Plan of a Wales umbrella brand, to which food and drink businesses can link their own brands, seems to explain the exhibitor actions well in this regard. Indeed, branding and advertising emerged as a key theme, with traders stating that they use Welsh themes and the Welsh language, while others produce additional information, such as leaflets, to tell the story of the product, or talk to customers about their business and produce at the point of sale. Specific reference is made to using food policy to promote the Welsh language in the Action Plan (Action Point 11) and the names of products offer a natural opportunity to do so, as they also underline the authenticity of the produce. Though difficult to quantify, there is a sense that reference to 'Welsh produce' has become more explicit in the comments made by exhibitors over the last three years of evaluations, particularly in terms of specific actions intended to make more of the Welsh origin of the food, such as the naming of products and the design of the packaging.

Exhibitors were also asked to what extent Welsh produce was promoted by the food festivals themselves (i.e. by the organisers of the food festivals through their promotional materials, etc.). Figure 3.10 shows that there were very few instances where exhibitors felt that Welsh produce had not been promoted at all. The Action Plan states that supported events should raise the profile of Welsh food and drink (Action Point 36) and there is evidence here that this is widespread throughout food festivals. The Anglesey Oyster & Welsh Produce Festival scored most highly on this aspect, with around four in five (20/23) respondents who had attended this festival reporting that Welsh produce was promoted 'to a great extent'. Again, these figures must be interpreted with an element of caution, as the number of exhibitors having attended any particular event can be quite small.

It might have been expected that the smaller food festivals would be more likely to have a local focus, whereas the larger festivals might perhaps transcend their immediate locality and more heavily promote the idea of 'Welsh produce'. The results, however, show that this isn't necessarily the case. For example, Abergavenny and Conwy are quite large festivals which received Tier 3 funding, and yet were certainly no more likely to promote Welsh produce than other smaller festivals in the eyes of the exhibitors. This is not to say that larger festivals do not promote Welsh produce — it is very apparent that they do. However, this does tie into a theme described more fully in Chapter 6, wherein some festivals (particularly some larger festivals, though not exclusively) are 'place-based' in that they are standard bearers of the economic and cultural development of local areas.

Figure 3.10: Generally, how actively was Welsh produce promoted at each event you attended?



n = varies as shown[9]

3.4 Impact of Food Festivals

3.4.1 Research and development

As was shown in Figure 3.9, although not the most frequently cited motivator, 60 per cent of exhibitors attend festivals with an intention to test new products and brands. To find out more about this, the 2015 survey asked exhibitors to describe exactly how food festival attendance had influenced their business with regard to the products they sell, how they sell them, and where they are sold. Supporting opportunities for learning, research, and product and market development is closely aligned to Welsh Government policy for the food and drink sector, as evidenced in the Action Plan (and alluded to in Action Points 8, 14, 20, 21 and 31).

[9] Festivals attended by fewer than 20 respondents are not shown.

Half (50 per cent; 124/250) of all exhibitors said that attending food festivals had influenced the development of their products or their pricing. The result does not substantially differ depending on the size or age of the business and the following selection of comments demonstrate the varied forms that product development can take:

> *"I discovered that I need to vary what I sell when I attend different events in different places as tastes are different."*

> *"We developed a new fruit cider because the demand was there, we changed the price according to what we think is the right price because of feedback from customers."*

> *"We're developing new products - we had chefs approach us asking us to develop new products specifically for them."*

> *"I like to experiment with developing new products by looking around the different producers at what they don't sell and what I could make."*

> *"I designed things which were easier to handle, easier to transport, easier to serve, serving customers more quickly and easily, developed things with longer shelf life, I thought about everything that I bake in the range and whatever was most popular, I increased the level of production and changed and added new flavours."*

> *"People ask me at festivals, 'Do you make this kind of bread?' I say, 'No, but I will do by the next time I see you.'"*

> *"Selling at my first festival gave me an idea of what I can get for my cakes - that I can sell them for a little more than normal."*

> *"We use food festivals to trial new products with the public and will act on feedback."*

Around one-quarter (26 per cent; 66/250) reported that they had changed the *way* in which they sell their products through attending food festivals. For the majority of these respondents, this meant that they had developed their branding and packaging for products based on what they had learnt about customer preferences:

> *"We've produced new labels with 'Welsh' on them. A lot of people said they'd like to see Welsh names on Welsh products."*

> *"We no longer sell things wrapped and labelled. They sell better openly displayed like they would on a deli counter. Finding packaging is less and less important to customers because of trying to help the environment."*

> *"We look at how we present the good - more 'street' packaging and how we write our signs, we're more conscious of representing our brand."*

Once more, learning the value of promoting 'Welsh produce' came across strongly here, and for some exhibitors this appeared to be associated with a more general trend towards promoting the *authenticity* of their goods through, for example, embracing the 'street food' aesthetic, whereby traditional food is sold in traditional packaging.

More than one-third (36 per cent; 90/250) of respondents said that they had changed *where* they sell their products as a result of attending food festivals. These exhibitors described how food festivals had helped them to establish markets in new geographies:

> *"We've got an online shop now because we constantly get asked where people can buy our produce from when they buy at the festivals, so we're sending it out to people living in London, etc."*

> *"We managed to get our products into two shops in Abergavenny after doing that festival."*

> *"New wholesaler and they distribute further afield, the honey gets sold just across the Channel, goes to the Benelux countries and we also supply the cruise ships as well."*

In addition to making new contacts and getting products taken up by local shops, which might be expected as conventional benefits from festival attendance, it is particularly interesting that some exhibitors had been encouraged to develop their online presence. Exhibiting at festivals is generally regarded as quite an intimate face-to-face sales channel, which would seem to contrast with online sales. However, the two clearly do complement each other for some exhibitors, as they allow relationships made with customers at festivals to be maintained even when the customer and producer are geographically distant (note that this could be either a consequence of a producer attending a festival outside of their locality or a festival attendee being a visitor to the area). The anecdotes described by the comments can also help in understanding how some exhibitors might feel that festival attendance is responsible for many indirect sales. An introduction to a new customer at a festival could conceivably yield sales for years to come.

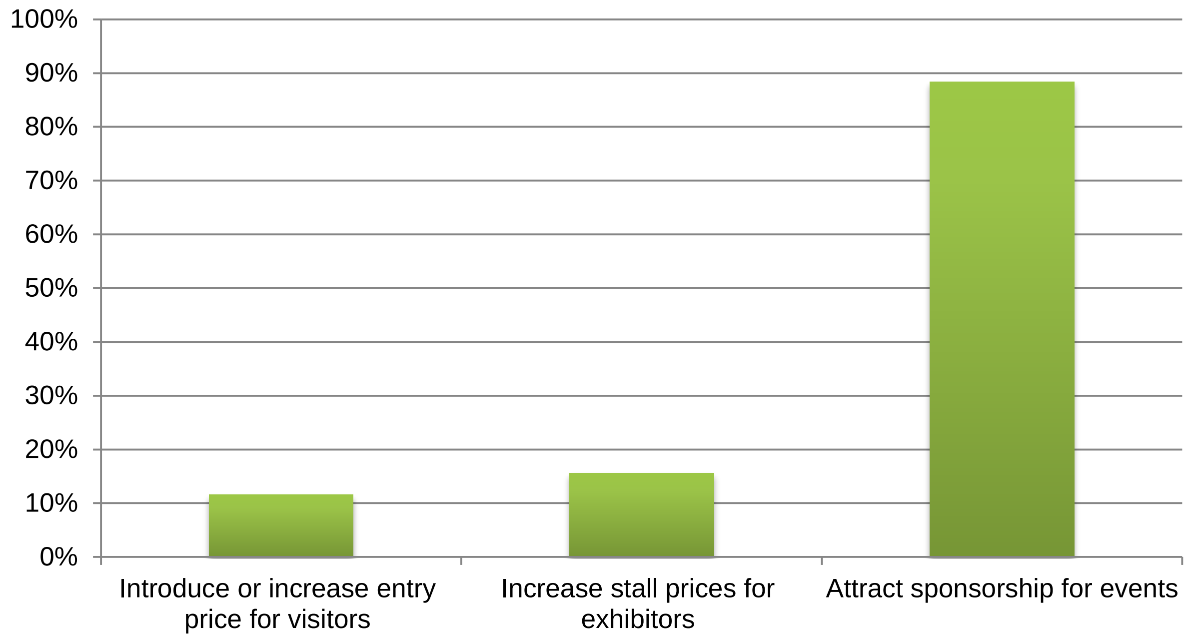
3.4.2 Funding food festivals

Exhibitors were asked to reflect on what they thought could be done to secure alternative sources of funding for food festivals. This is an area of particular interest, given the policy aim for food festivals to become sustainable (see Action Point 36 of the Action Plan, for example). Responses to three specific suggestions are shown in Figure 3.11 below.

Overall, exhibitors were not in favour of introducing or increasing entry prices for visitors, with just 12 per cent stating that this should be considered. A similar proportion (16 per cent) thought that increased stall prices for exhibitors could be considered. More support was shown for the suggestion of attracting sponsorship for the events, with 88 per cent stating that this should be considered. This is perhaps unsurprising, as the former two options could both feasibly have negative consequences for the exhibitors themselves (in terms of reduced attendance or increased costs). Nevertheless, anecdotally, it does seem that notable examples of event sponsorship are predominantly restricted to the largest festivals. It is not easy for smaller festivals to secure sponsorship on an individual basis, and this is discussed more fully in Chapter 5.

Perhaps the real finding here is the antipathy of exhibitors to introducing entry prices for visitors (exhibitors would rather pay more themselves), which underlines the perceived importance of getting exposure to as wide an audience as possible. As has been discussed, most exhibitors attend festivals to make both direct and indirect sales and, therefore, attracting as large a number of people as possible to the festivals becomes very important to exhibitors.

Figure 3.11: Thinking about the benefits that attending food festivals brings to your business, which of the following options do you think should be considered for the future?



3.5 Summary

Over 900 unique businesses exhibited at food festivals which received Welsh Government grant funding in 2015. Over three-quarters of the exhibitors were based in Wales and with a tendency to come from rural local authority areas, though not exclusively so. The businesses were predominantly micro-businesses and almost a third had not yet been trading for three years. Though only a minority of exhibitors follow the food festival 'circuit', the majority attend just one food festival, though this is typically one of several fairs and events at which the business exhibits throughout the year. Although businesses most frequently exhibit at festivals to make direct sales, nine out of 10 also exhibit for marketing purposes, whilst 60 per cent also attend for research and development purposes. Eight out of 10 exhibitors report that they actively promote Welsh produce and feel that the festivals themselves generally do the same, although there may be some interesting variation here. Anecdotally, exhibitors described how Welsh names and authentic packaging can be used to make the most of the 'Welsh produce' brand. Finding new customers and getting exposure to as wide an audience as possible are important to exhibitors and they are overwhelmingly against festivals charging attendees (more) for entry.

4 Food Festival Attendees

This section reviews the findings from responses to a face-to-face survey of attendees at six Welsh Government-funded food festivals. The chapter discusses the catchment areas of festivals, the motivation for attendees to come to the festivals, how they rated different elements of their experience, and whether they plan to attend next year. The chapter ends by looking at how much time and money attendees spend at the festivals.

Summary

- A total of 909 attendees were surveyed across six festivals attended by the research team
- Food festivals differ considerably in the size of their catchment area
- The most frequently cited reason for attending food festivals is to buy local produce
- For some festivals the reputation of the event may be the most important pull factor, whilst others may capitalise on their proximity to large population centres or tourist resorts
- Festivals were generally rated most highly for the availability of takeaway food and the range of food and drink on offer
- Reported levels of enjoyment are not always sufficient to explain whether or not attendees plan to return next year
- Festivals which are spread over more than one day may benefit from longer attendee stays, but this is not always the case
- The average spend per adult head is £24.74 across the six festivals researched
- But spend varies considerably across the festivals, being closely related to how long attendees stay at a festival
- Attendees overwhelmingly think that the origin of food is important, though may not always have the opportunity to buy Welsh food in their normal shopping

4.1 Introduction

The selection of food festivals attended by researchers sought to provide a useful range of geographies and operation scales, but the six festivals visited will not provide a complete representation of the sector. A total of 909 attendees were surveyed and a brief summary of the six festivals is shown in Table 4.1 below, followed by a map showing their location:

Table 4.1: Summary of festivals at which the attendee survey was performed

Festival	**Date**	**Estimated footfall**	**Sample size**
Abergavenny Food Festival	18th to 20th of September 2015	30,000	150
St Fagans Food Festival	5th to 6th of September 2015	26,000	155
Conwy Food Festival	24th to 25th of October 2015	25,000	151
Beaumaris Food Festival	12th to 13th of September 2015	15,000	152
Newport Food Festival	3rd of October 2015	13,000	151
Narberth Food Festival	26th to 27th of September 2015	7,500	150

Figure 4.1: Map showing the locations of festivals at which the attendee survey was performed

Key	
A	Abergavenny
B	Beaumaris
C	Conwy
D	Narberth
E	Newport
F	St Fagans

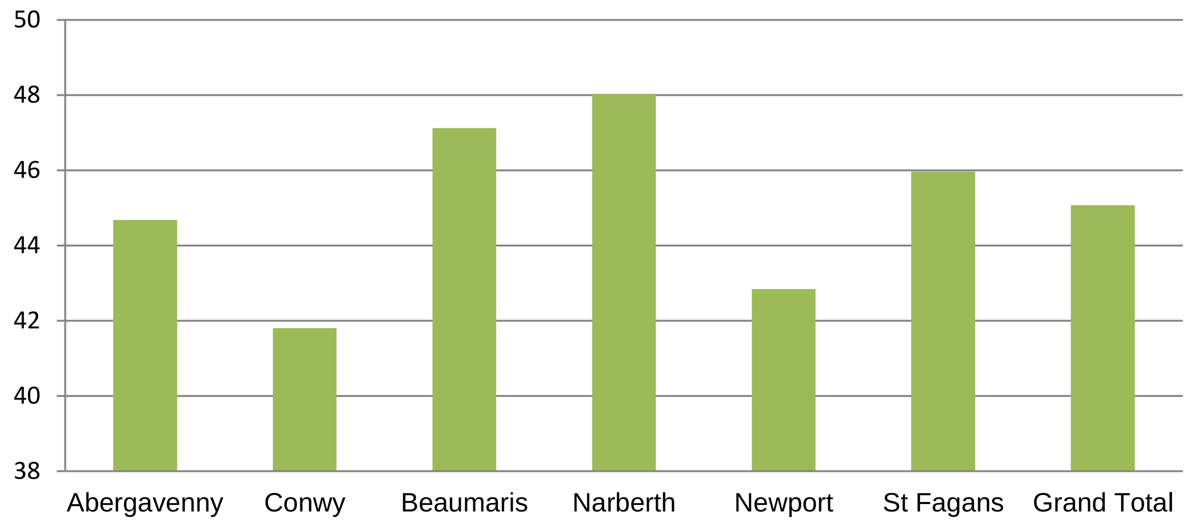
To crudely categorise, it might be said that the survey covers three larger events (in Abergavenny, St Fagans, and Conwy) and three smaller events (in Narberth, Newport, and Beaumaris). However, the footfall reported at St Fagans is, in part, a consequence of the surrounding heritage attractions, and perhaps gives a slightly inflated representation of the size of the food festival itself.

Conwy (on the north coast) and Beaumaris (in Anglesey) are theoretically well placed to benefit from tourism, given the popularity of that region with visitors from the North West of England. Although in a somewhat different setting, Abergavenny, due to its proximity to the English border and the popular Brecon Beacons National Park, may similarly benefit from (and contribute to) tourism. Newport and St Fagans (Cardiff) are city festivals, expected to draw predominantly from the local populace, whereas Narberth is a small town in Pembrokeshire.

4.2 Attendee/Visitor Profile

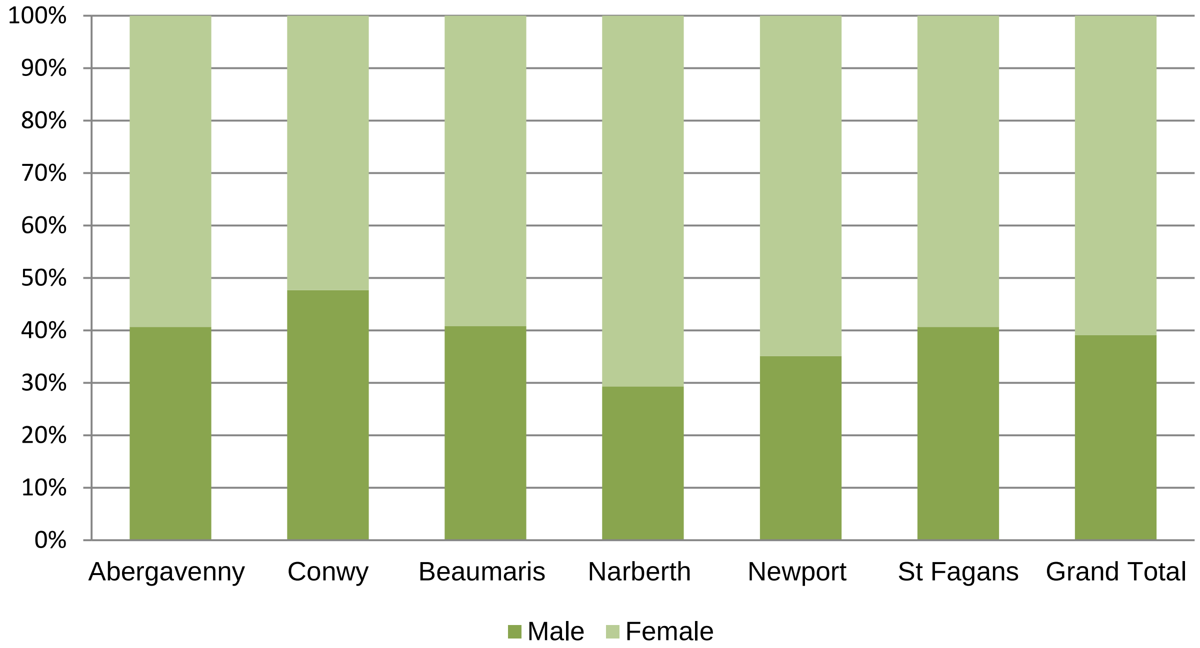
The average age of the survey respondents was 45. Conwy had the youngest group of survey respondents, with an average age of 41, whilst the oldest respondent group was from Narberth, with an average age of 48. Accordingly, a higher proportion of respondents from Narberth were retired (27 per cent) than across the whole sample (18 per cent).

Figure 4.2: Average age of the respondents



More of the survey respondents were female than male, with this imbalance most exaggerated at Narberth, where 71 per cent of respondents were female. Conwy has the most equal gender balance, where 48 per cent of the respondents were male. Ethnically, the sample was 97 per cent White, which was quite consistent across the festivals; for Narberth, 99 per cent of respondents were White, whilst in Newport the figure was 95 per cent.

Figure 4.3: Gender balance of the respondents



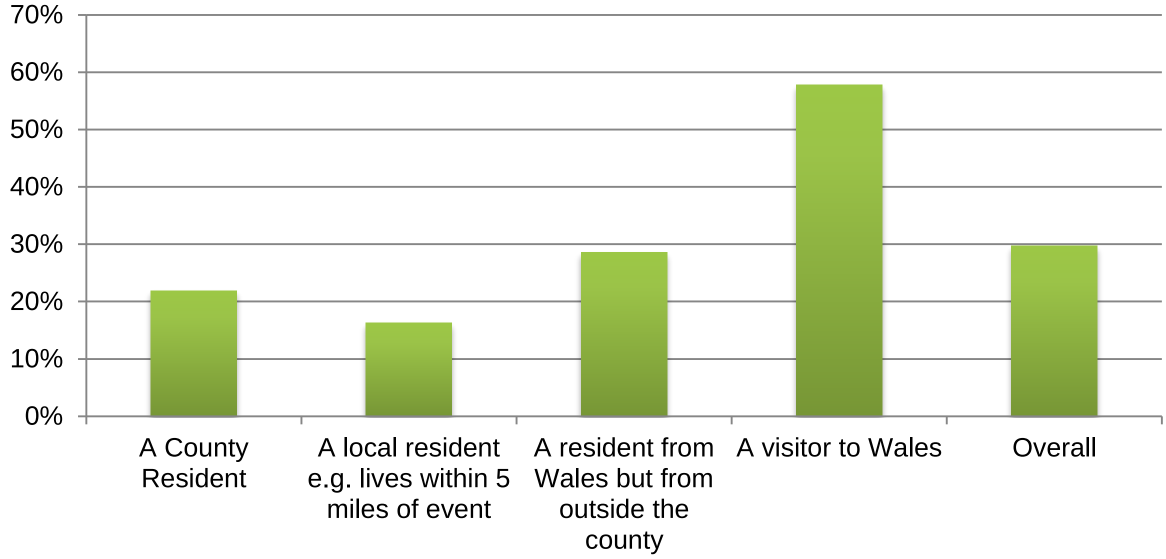
Survey respondents were asked whether they were a local (living within five miles), a county resident, a visitor to the area from within Wales or a visitor from outside Wales. There appears to be great variation here, with 62 per cent of visitors to Newport Festival considering themselves to be local (compared to just 14 per cent at Conwy and 17 per cent at Abergavenny). This disparity is doubtless, mainly as a consequence of the localities; it is expected that festivals near large and dense population centres could attract more visitors who consider themselves 'local'. Similarly, there is little surprise that Beaumaris attracts the most visitors from outside Wales (43 per cent), given the popularity of Anglesey as a short-break destination from North West England.

Table 4.2: Visitor origin by festival

Festival	A local resident	A county resident	A resident from Wales but from outside the county	A visitor to Wales
Abergavenny	17%	15%	41%	27%
Conwy	14%	32%	23%	32%
Beaumaris	28%	18%	11%	43%
Narberth	23%	30%	37%	10%
Newport	62%	22%	11%	6%
St Fagans	31%	16%	44%	9%
Overall	**29%**	**22%**	**28%**	**21%**

Food festival attendees were asked whether this was their first visit to a Welsh food festival; across all of the food festivals surveyed, 70 per cent, overall, had attended a food festival previously, the same as in 2014 (though the mix of festivals visited by researchers was different). Beaumaris is the most likely to attract first-time attendees (47 per cent), which is perhaps a function of the high proportion of attendees who are visitors to Wales, whilst Narberth had the lowest proportion of first-time visitors to Welsh food festivals (20 per cent), which may be partially understood by its location in the far South West and the relatively low proportion of visitors from outside Wales.

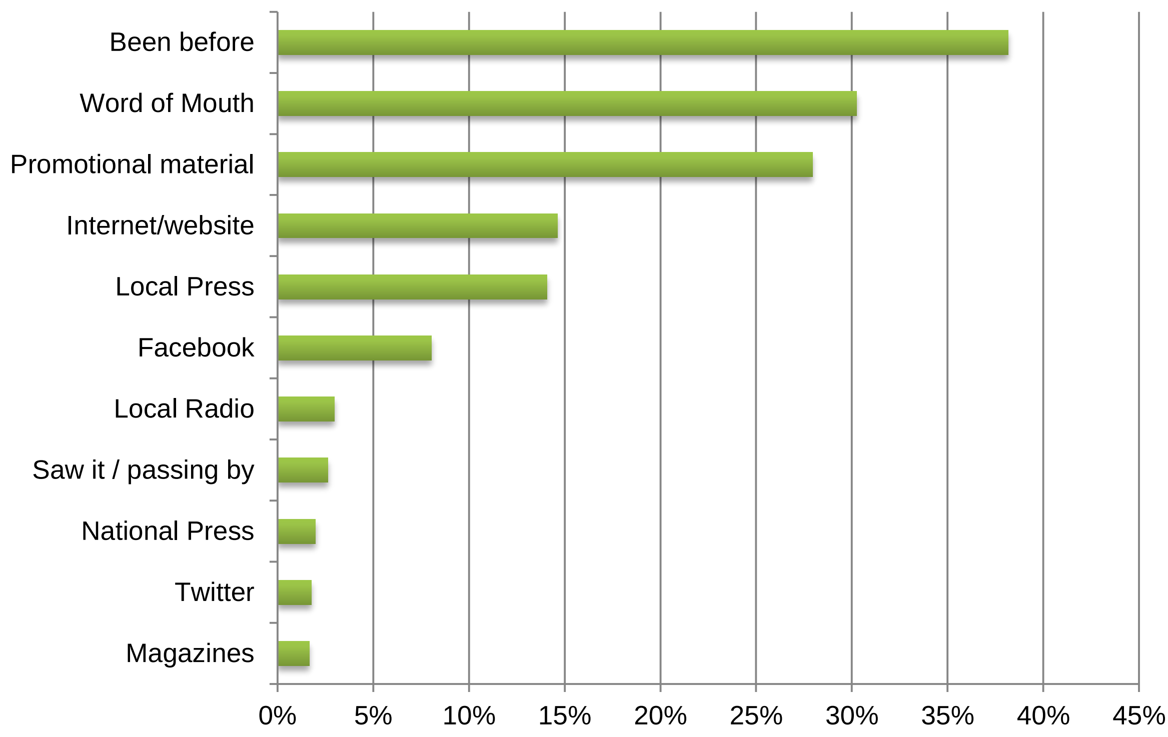
Figure 4.4: Proportion of respondents attending a Welsh food festival for the first time by visitor origin



4.2.1 Awareness and attraction of food festivals

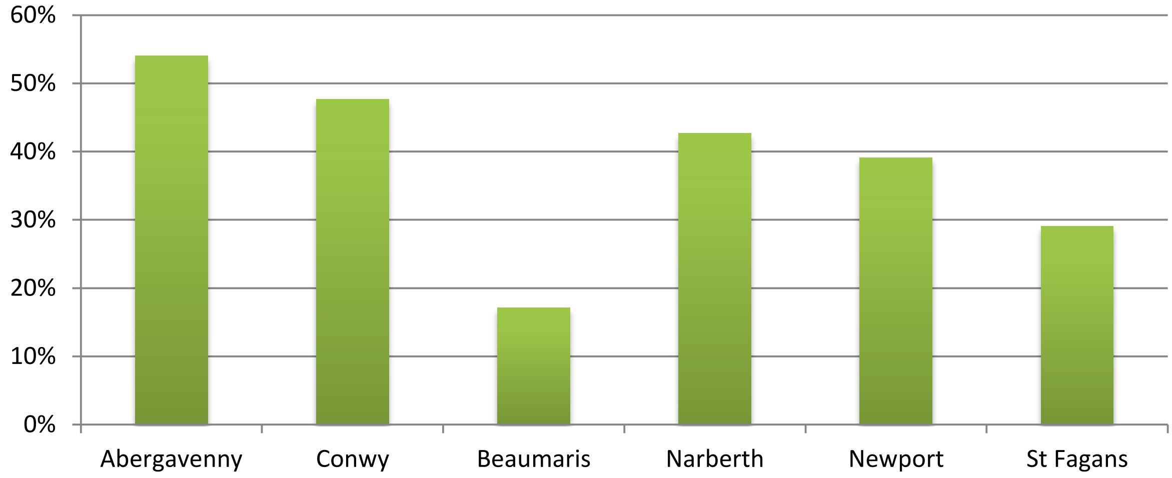
The survey respondents were asked how they became aware of the food festival that they were attending. Figure 4.5 illustrates that previous attendance was the most important factor. As shown in Figure 4.5, the proportion of respondents who had heard of the festival because they had attended before was highly variable across the different festivals, ranging from 54 per cent at Abergavenny to just 17 per cent at Beaumaris. This helps to give a greater understanding of the different characters of the festivals. Beaumaris might be expected to have a low proportion of attendees who have attended before, as 43 per cent of visitors come from outside of Wales and the festival was only in its second year. Conwy and Abergavenny have the highest proportions of attendees who have been before, despite also having relatively high proportions of visitors from outside the country. This perhaps suggests that festivals at Abergavenny, Conwy and, to a lesser extent, Narberth are more likely to be destinations in their own right than the food festival at St Fagans, and perhaps Beaumaris, which may instead benefit from the general appeal of their locality.

Figure 4.5: How did you hear about the food festival?



n=909

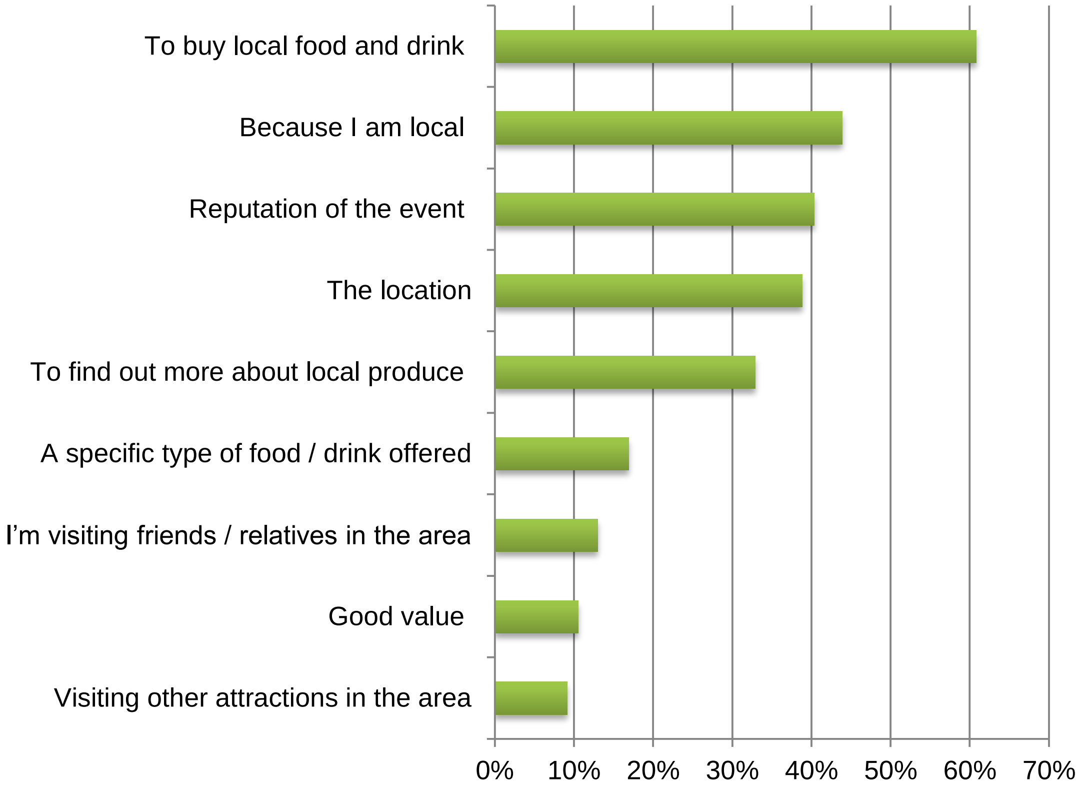
Figure 4.6: Respondents who heard about the festival through previous attendance by festival



Attendees were then asked which three (of a list of) factors were most influential in their decision to attend that food festival. The opportunity to buy local food and drink was, overall, the most popular factor, as was the case in 2014. Just over 60 per cent of interviewees cited this as a leading reason for their attendance — this figure remains reasonably consistent across festivals. Despite this, the opportunity to buy local produce was not the most frequently given reason for attendance at Abergavenny and Conwy; rather, it was the reputation of the event, with 67 per cent and 62 per cent, respectively, citing this as a key factor. This would seem to again distinguish these two quite large events as destinations in their own right, able to pull in visitors based on their reputations.

By contrast, 59 per cent of attendees at Beaumaris describe 'the location' as a critical factor, complying with the idea that the festival capitalises on visitors to the area, whilst 64 per cent of visitors to Newport attended in part because they were local, underlying the notion that such city events predominantly serve local residents as part of the cultural calendar of the city. St Fagans is, in some ways, positioned between the two, benefiting from its locality to Cardiff but also its location in a cultural centre (near a national museum), which can draw on the South Wales hinterland around the capital.

Figure 4.7: Which three factors most influenced your choice to come to this festival?

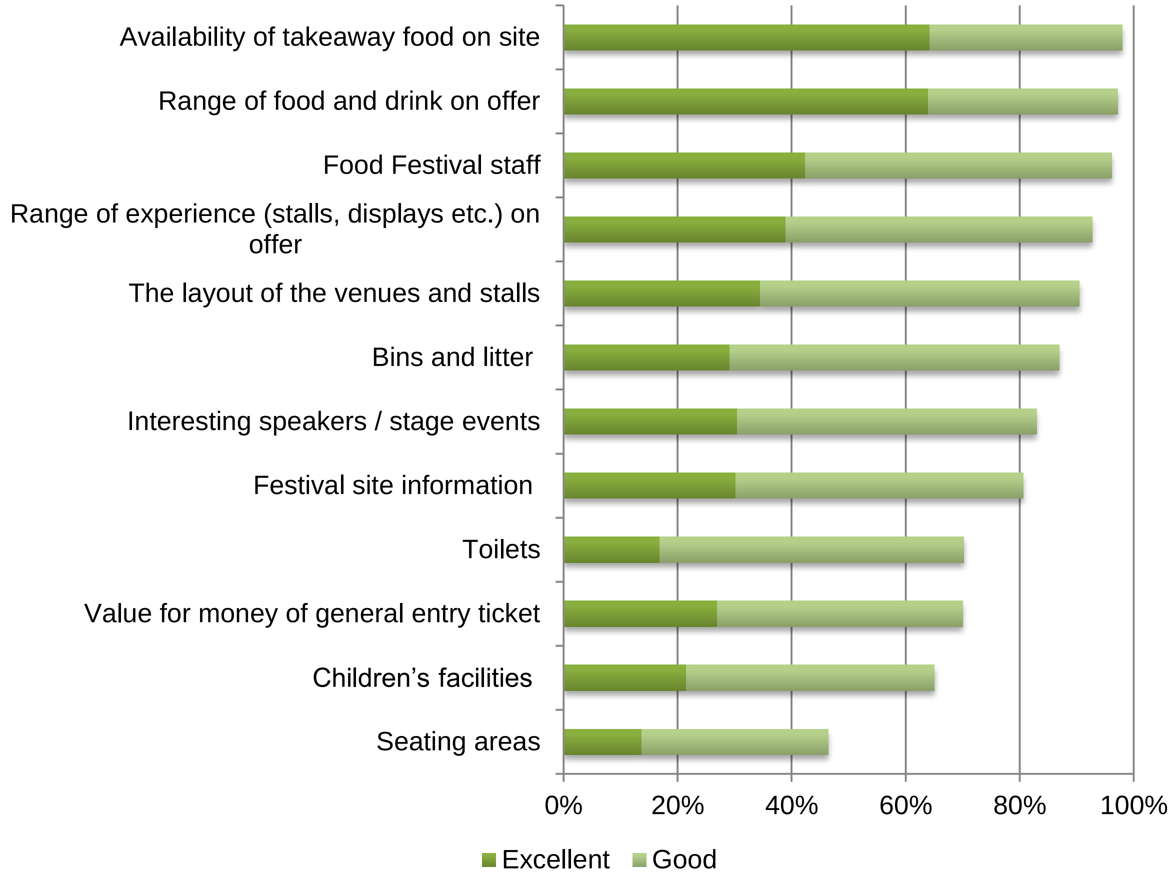


n=909

Festival Feedback

Attendees were asked to rate a range of elements at the food festival that they were attending. Figure 4.8 provides details on the proportion of attendees describing each element as good or excellent. The responses demonstrate a high level of overall satisfaction with the quality of the festivals, with particularly high ratings for the range of experience, the range of food and drink, the availability of takeaway food on site, the staff, and the layout of the venues and stalls. Less positive feedback was given on seating areas and facilities available for children. These findings are largely consistent with the feedback from previous years.

Figure 4.8: Proportion of attendees rating elements of food festivals as “excellent” or “good”

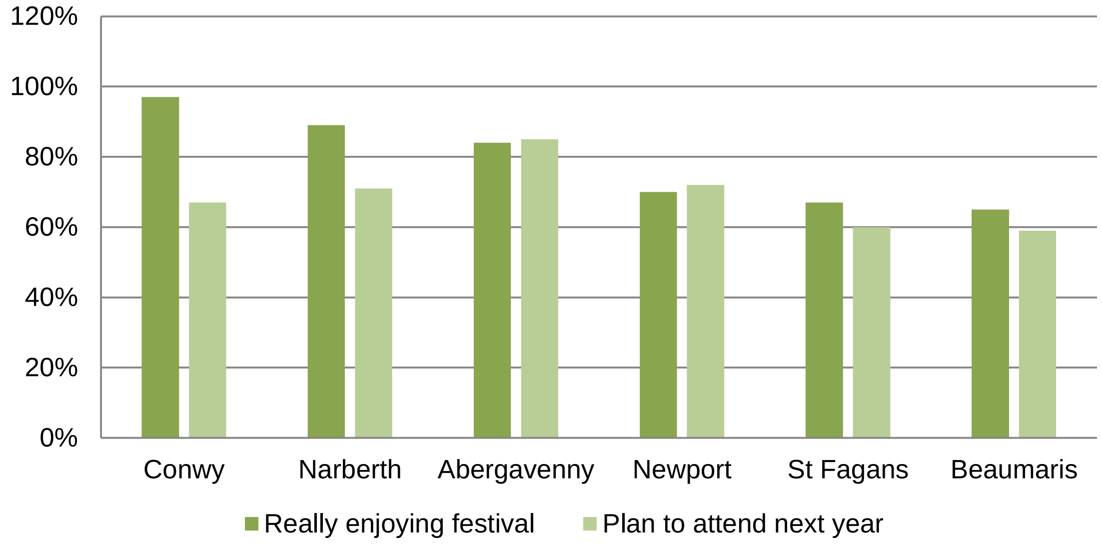


n = ranges from 186 to 904 (those who responded with “can’t answer” were excluded from calculations)

There was some fluctuation in the ratings against the food festival criteria from one festival to the next. Notably, St Fagans received unusually high ratings for what are generally the two most problematic elements for food festivals: children’s facilities (95 per cent good or excellent) and seating areas (67 per cent good or excellent). Attendees at Conwy Food Festival were most likely to say that festival site information was good or excellent (92 per cent). A breakdown of attendee satisfaction by elements of each of the six festivals is included in the Annex. In some cases a comparison between festivals of different types and scopes can be problematic. The attendees’ expectations of the event are likely to have a strong influence on their answers. For example, although Abergavenny (97 per cent) and Conwy (95 per cent) score highly on the range of activities on offer, it is likely that attendees also expected a good range of activities from these larger events. Indeed, their programmes advertise a very wide entertainment offer. It is difficult, therefore, to directly compare these figures with the 91 per cent of attendees who thought that Newport offered a good range of activities and the 98 per cent who did so at Narberth, given that attendees at these festivals may have had very different expectations. However, it could reasonably be suggested that Narberth may have exceeded the range of activities expected from a festival of that size.

Figure 4.9 shows overall levels of reported enjoyment for each festival against how likely attendees said they were to return next year. It is clear that reported levels of enjoyment are not always sufficient to explain whether or not attendees plan to return next year. For a festival which attracts a high proportion of local people, the level of enjoyment and the intention to return are expected to be quite similar, as there are few barriers which prevent attendees from coming back next year, and this is particularly seen with Newport. For visitors from farther afield, the decision to attend next year is likely to be influenced by other factors, in addition to whether they have enjoyed the festival, such as whether or not they will be visiting that part of the country again next year. However, Abergavenny seems to reverse this trend, as it both attracts visitors from a wide catchment area and has a high proportion of attendees who plan to return after having enjoyed the event. This seems consistent with the idea that, as a large festival, Abergavenny is essentially a destination in its own right to the extent that visitors make specific plans to attend, and attendance is therefore not as reliant on contingent factors. In this regard, there is an interesting distinction with Conwy, which shares certain characteristics with Abergavenny but may not be quite as developed in establishing itself as a destination in its own right which is able to override contingent factors such as whether or not visitors plan to be in the area next year (perhaps explaining the disparity between the proportion of people who have really enjoyed the festivals (97 per cent) and those who plan to return (67 per cent) to Conwy Food Festival).

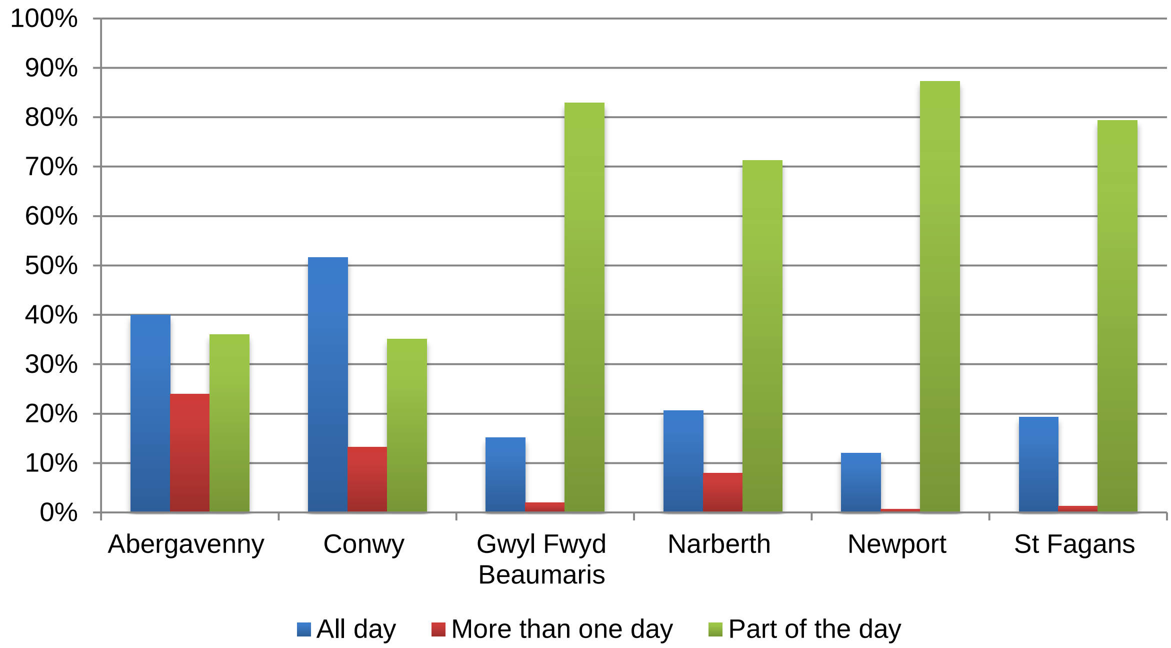
Figure 4.9: How are you enjoying the festival (percentage that are Really enjoying), and how likely are you to attend or take part in events at the food festival next year (percentage that are Definitely)?



4.2.2 Length of festival attendance

Attendees were asked how long they planned to spend at the food festival. Overall, respondents will typically attend food festivals for part of the day, although there are some noteworthy differences across the festivals. The results are partly dependent on the length of the festivals. Abergavenny is a three-day festival, Newport just a one-day festival, with the remainder two-day festivals. The festivals also have different operating hours within each day. Nevertheless, despite being open for two days, very few visitors to Beaumaris and St Fagans attend on more than one day (compared to Abergavenny and Conwy). This may therefore be, to some extent, indicative of the depth of the customer offer at different festivals.

Figure 4.10: How long do you intend to spend at the food festival?



4.2.3 Average spend per food festival attendee

Attendees were asked how much they planned to spend at the festival. Table 4.3 shows the average spending per adult at each of the festivals visited. There is a high degree of variance in average attendee spend from one festival to the next, with attendees at St Fagans planning to spend, on average, around £18 each, rising to around £35 for attendees at Abergavenny. The results appear to be closely related to the time that attendees typically spend at each festival.

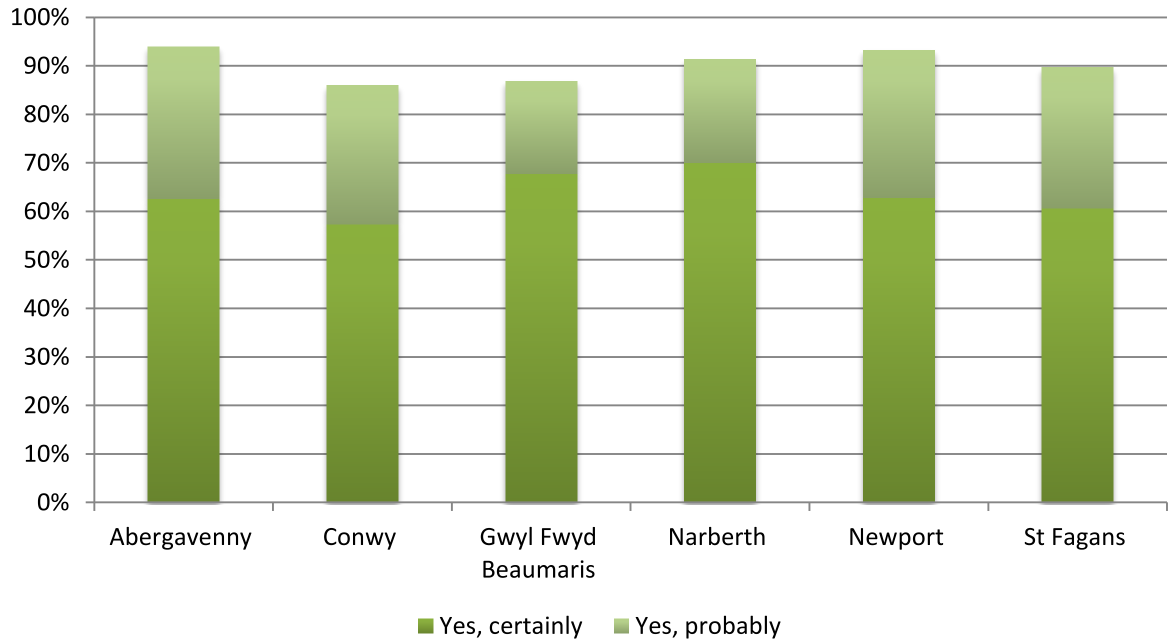
Table 4.3: Average spend per (adult) attendee

Festival	Average Spend
Abergavenny	£35.48
Conwy	£33.61
Beaumaris	£21.54
Narberth	£21.13
Newport	£19.34
St Fagans	£17.54
Overall	**£24.74**

4.3 Attitudes of Food Festival Attendees

Attendees were asked to reflect on whether attending food festivals had increased their awareness of local food and produce. This is particularly relevant to Action Point 36 of the Action Plan, which justifies grant support for events which raise the profile of the Welsh food and drinks industry. As shown in Figure 4.11, there was little variation in responses to this question across the different events, with around two-thirds of attendees feeling that their awareness had certainly increased (which is also very similar to the results from 2014 with a different set of festivals).

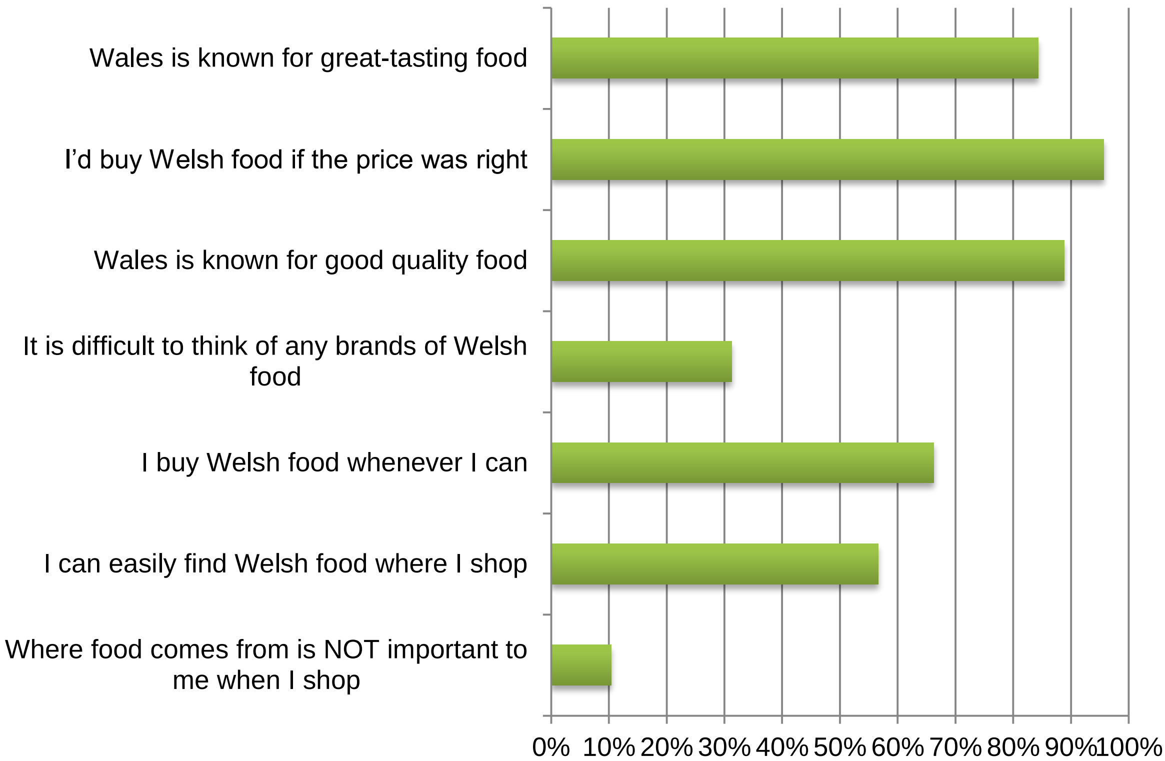
Figure 4.11: Does attending the food festival increase, or has it increased, your awareness of local food and produce? (by food festival)



Attendees were then asked to reflect on how much they agreed with a series of statements relating to Welsh food and drink. More than nine in 10 respondents agreed that they would buy Welsh food if the price were right, with two-thirds (66 per cent) reporting that they buy Welsh food whenever they can. Fewer respondents (57 per cent) stated that they can easily find Welsh food in the places where they shop. This is particularly the case for attendees at Beaumaris, where only 49 per cent felt that they could find Welsh food where they shop, and is presumably a consequence of the high proportion of non-Wales-based tourists who attend that festival. Conversely, 65 per cent of attendees at Narberth, which has a far greater proportion of Wales-based attendees, felt that they could easily obtain Welsh produce when they shop. The results do seem to suggest that improving access to Welsh food could play a role in growing the sector (linking in with Action Point 45 of the Action Plan).

The responses demonstrate that the majority of food festival attendees consider the origin of the produce they buy, with just 10 per cent agreeing with the following statement: “Where food comes from is NOT important to me when I shop.” This is quite a definitive result, though cannot be taken as representative of the population at large — food festivals doubtlessly attract attendees who are interested in local food and then probably reinforce that through their activities. Nevertheless, it would seem to suggest that, within their niche, food festivals operate in quite a benign cultural environment which recognises and is sympathetic towards their objectives.

Figure 4.12: To what extent do you agree with the following statements? (percentage that Agree/Strongly Agree)



4.4 Summary

In summary, the size of the catchment area for food festivals can vary considerably between festivals which predominantly attract a local crowd and those which have visitors from across Wales, England and beyond. Whilst some festivals seem able to draw in visitors based on the strength of their reputation, others may predominantly benefit from, and capitalise on, their proximity to large urban centres or tourist locations. However, for all food festivals the importance of local produce is still key to both attracting attendees and the visitor experience. The loyalty of attendees to return year on year appears to differ considerably between festivals, and the level of enjoyment experienced by attendees is not sufficient to explain this. Rather, it seems that the degree to which the customer base is transitory, in that they are passing through the locality rather than being permanently based there, is an important barrier to return visits, though one which may be partially overcome by larger festivals, which are able to establish themselves as a destination in their own right. Average adult spend at food festivals is under £25, though this is more likely to be around £20 for festivals which fail to encourage a proportion of attendees to return on a second day. Festival attendees generally agree that local food is important and feel that attending food festivals increases their knowledge.

5 Trends within the Sector

This chapter discusses some of the trends which appear to be emerging in the sector. On the basis of interviews with festival organisers and the experience of undertaking food festival evaluations over the past three years, the chapter develops and offers a narrative for some of the findings presented previously within the report. It also discusses the barriers to, and possibilities of, collaborative working between festival organisers, with particular reference to the challenges of forming an Association of Welsh Food Festivals.

Summary

- Some festivals are broadening their offer into non-food areas and may be concerned with a range of issues, including local economic development, promoting local culture and tourism
- By contrast, other festivals may operate more simply as a showcase for local producers
- Attempts to form an Association of Food Festivals have stalled due to a lack of administrative capacity, the desire of some festivals to maintain their autonomy, and the differing strategic directions of the festivals
- There may be potential for greater collaboration between groups of festivals on certain issues, although this is now likely to require third-party facilitation

5.1 'Place-based' Festivals

The scale of festivals supported is wide-ranging, with footfall ranging from 2,500 to far in excess of 20,000 and with exhibitor numbers ranging from 30 to 130. The range of sizes in food festivals and their geographic spread inevitably creates great variety between events. To generalise or categorise festivals will therefore always represent an oversimplification. Nevertheless, there is a theme which has emerged from the survey results, and is recognised in the interviews with festival organisers, that would seem to account for some of the variety amongst the food festivals. In binary terms, this can be seen as a distinction between festivals which focus tightly on showcasing local producers and those which take a broader remit in which local produce plays a role. In reality, of course, festivals occupy various points upon this continuum.

Occupying one end of this continuum are festivals which have begun to diversify their offer so that food, though still central to the events, may be complemented by a range of other activities and may include a more prominent role for arts, crafts and performers. In doing so, these festivals are able to offer a more complete entertainment experience with the hope that visitors stay longer and even across more than one day. For example, some festivals are now staying open later into the evenings and may have licensed areas around musical acts. In these ways, the boundary between a ‘food festival’ and a festival which has a food component can become blurred, though food continues to play a central role.

These developments are reflective of the objectives of some of the festivals to play a larger role in supporting the economic and cultural life of their local area in general, rather than only representing the interests of local food producers. Such events can perhaps be thought of as ‘place-based’ festivals in virtue of the way in which they promote the wider interests of the area. For example, some festivals (more than others) may purposively try to attract tourists by promoting the event outside of the local area. Abergavenny would perhaps be an example of this (with Conwy on a similar journey), but the approach is not exclusive to very large festivals. Rather, it is the size of the festival relative to its locality which may influence the scope of its ambition. For example, Narberth exhibits some of the same traits as Abergavenny in terms of trying to diversify its offer and encourage visitor loyalty.

The contrast to this approach, at the other end of the continuum, would be festivals which more simply aim to showcase local food to nearby populations. Such events can be considered ‘food-based’ in that they conform more closely to what might be thought of as a traditional food festival, organised around a core group of local producers supplemented by other traders providing confectionery or hot drinks, and with some basic service provision provided by the festival organisers. Whist this would be expected to describe many of the smaller festivals, some festivals which have relatively high footfall, such as Beaumaris and St Fagans, arguably conform to this traditional model too, in that they predominantly bring local food to an existing tourist or urban market. These festivals may be less successful in attracting visitors to an area or spurring economic development, as they are not ‘destinations’ in their own right, but they may be equally as successful by their own terms of reference, in that they successfully promote local produce. Conversely, ‘place-based’ festivals also promote Welsh food, but this may adequately describe the scope of their ambition.

‘Place-based’ festivals suggest that an integrated approach to support provision is necessary. It reinforces a point made in Chapter 2 that the contributions of some festivals may cut across several government departmental areas to include economic development, tourism, regeneration, and community cohesion. This is identified to some extent in the Action Plan, most notably in Action Point 34, which highlights the importance of working with Visit Wales on the Food Tourism Action Plan.

5.2 Working Together

There have been various attempts in recent years to form an overarching body of some sort which would allow food festivals to benefit from both greater collaboration and greater influence. Action Point 33 of the Action Plan discusses the importance of working with sector partners in joint market development and promotional activities, whilst a Food Festival Association is specifically mentioned in Action Point 36 (iv) in order to improve coordination.

The latest attempt to form an association was in 2014 when the Association of Welsh Food Festivals was proposed with the following objectives:

- to encourage food festivals to work together to address issues and common problems in organising food festivals
- to encourage food festivals to work together in promoting their events — particularly those outside the boundaries of Wales — and to enhance food tourism in Wales

- to provide feedback and discuss issues arising in the future for food festivals directly with the Welsh Government, and offer advice and input to the Welsh Government on matters such as funding streams, grants, etc.

Membership was to be open to all food festivals and regional groups would elect representatives to a national committee. However, as with previous attempts, this initiative has stalled. The reasons behind the apparent failure of such projects were explored in interviews with festival organisers and other strategic stakeholders, before discussing if, and how, collaborative working should be taken forward.

There was some consensus amongst those who had been directly involved in the creation of the nascent association that the immediate explanation for its discontinuation was a lack of administrative support. Running the association would inevitably have required a secretariat function to deal with correspondence, book meetings, and to prepare documents based on notes taken during meetings. However, there appeared to initially be no resources available for this, with the festival organisers feeling that they lacked the means to resource this secretariat role. Once the association had reached the point of having produced a formal business plan, an application could perhaps have been made to Welsh Government for secretariat support, but getting to that stage without such support was not possible.

Beyond this immediate reason, however, lay other proximate reasons which explain why the appetite for formal collaboration may vary somewhat across the festivals. For instance, one of the possible benefits of working together mentioned by advocates of greater alliance is the efficiency of joint purchasing. Whilst it seems feasible that there could be some financial gains to be made here, many festival organisers value their autonomy in this area. Festival organisers often have long-standing relationships with traders whom they trust and who know how to provide bespoke services for the festivals. In some cases, these local suppliers are central to the running of the festival, and may give considerable time and energy to making it a success. On a more strategic level, festival organisers are often very proud of their role in promoting local economic development and would wish to retain their ability to select local suppliers, even if marginal gains from joint purchasing were possible.

There is also a feeling amongst some, though not all, of the organisers of larger festivals that they would likely put more into an association than they would get out of it. The resource requirement for a secretariat position has already been mentioned, but there is also a sense that the longer-established, larger or more successful festivals may well have a lot of valuable knowledge to share, but it is unclear what they would receive in return from the growing number of smaller and more recently formed events (and this feeling is possibly confounded by fears of overcrowding in the sector).

There are then some good reasons why formal collaborative working, in a general sense, has not occurred. Notwithstanding this, there do appear to be certain areas in which greater collaborative working could perhaps be explored. An example of this is sponsorship, which seems to be limited for the smaller festivals. Smaller festivals are unlikely to be attractive to sponsors individually and organisers may lack the knowledge or contacts necessary. However, sponsorship packages which bundle festivals that draw similar types of visitor groups together would allow potential sponsors to reach a far larger audience without negotiating with individual festivals, and may therefore make the sector more sponsor-friendly. The creation, promotion and administration of sponsorship bundles are, of course, tasks in themselves, evoking the secretariat issue previously discussed. Another way in which to make progress with collaborative working may be to develop clusters in which festivals with shared interests can work together. These clusters may be either geographic or thematic (e.g. festivals which focus on the promotion of a particular type of produce), depending on where synergies most naturally arise. The restriction of collaborative working to either a single issue or within specified clusters eases the cost of coordination. Nevertheless, it is likely that a third party would be required to provide the initial leadership and administrative resources.

6 Economic Impact of Food Festivals

This chapter provides commentary and analysis to enable an estimation of the economic impact arising from the operation of food festivals in Wales. Economic impacts occur from benefits accrued by festivals to localities in which the festivals are held (e.g. from the spend of festival organisers and visitors) and benefits to the food and drink exhibitors (e.g. through sales made at the festival and later sales made as a consequence of the festival). Values associated with these elements have been captured through the primary research for the project, leading to the identification of gross direct impacts. Standard benchmarks and assumptions have then been used to move from these gross estimates to the final net estimates.

Summary

- The money spent by organisers to stage food festivals boosts the economy by an estimated £1.4m
- Attendees spend an estimated £3.82m at food festivals (based on reported spend at the festivals visited)
- The visitors attracted to food festivals from outside Wales are estimated to bring an additional £3.7m to the Welsh economy (based on reported spend by visitors at the festivals visited)
- The value of food festivals to the exhibitors in indirect sales may be substantially more than the sales made at the events (indirect sales are estimated at £17m, based on the perceptions of exhibitors)

6.1 Food Festival Operational Spend

The cost of staging the 25 food festivals which received Welsh Government grants in 2015 is estimated to be £1.2 million, based on the information provided by festival organisers during the application process. Of this, Welsh Government funding of £138,000 represents a contribution of 11 per cent to these running costs. The operational spend will boost the local economy in the localities around the food festivals, but to estimate the size of this impact it is necessary to account for various additions and subtractions. For example, it is necessary to account for how the impact becomes magnified as it travels down the supply chain (known as the multiplier effect) and the proportion of money expected to be lost of the Welsh economy (known as leakage)[10]. To give an approximate estimate, standard benchmarks have been used which translate to a leakage rate of 20 per cent and a multiplier effect of 1.45 within the economy (c. 1.45)[11]. After accounting for these effects, the net additional impact of food festivals in receipt of Welsh Government grants on the Welsh economy is estimated to be £1.39m.

6.2 Impact of Visitor/Attendee Spending at Food Festivals

6.2.1 Attendee spend

On the basis of the survey results, the average spend per adult at the food festivals stood at £24.74 per head. It is known that footfall is a challenge to estimate, as some festivals are non-ticketed events situated in town centre locations. To counteract the inflationary effects associated with these festivals, a 30 per cent reduction (based on comparative estimates with those from benchmarked data carried out by Miller Research in 2011[12]) has been applied to estimates contained in food festival grant funding applications. When this proportionate reduction is applied to the total 273,000 visitors forecast within the 2015 applications, it results in an estimated 191,100 visitors at Welsh Government-funded food festivals, which, in turn, equates to a total gross spend of around £4.7m at festivals. Importantly, however, the gross spend includes spend incurred through ticket purchases and this needs to be deducted from the festival spend figure. Again, to apply consistency with previous research, an estimated 20 per cent of this should be placed with ticketing, resulting in the remainder (c. £19.80) being spent on producers and stallholders, equating to £3.82m.

[10] Displacement and substitution effects are assumed to be nominal.
[11] See, for instance, Additionality Indicators, Department of Business Innovation and Skills (2010).
[12] Monitoring and evaluation of food festivals supported by the Welsh Assembly Government, Miller Research, 2011

6.2.2 Tourist spend

When survey respondents came from outside of Wales they were asked how much they had spent on their trip and to what extent the festival influenced their decision to come to Wales. Based on the answers to these questions, an estimate can be made for the value of induced tourism spend from the respondents at each festival. These results are summarised in Table 6.1 below. As can be seen, the festivals seem to vary a great deal in the amount of tourist spend they induce.

Table 6.1: Average net additional spend outside of festivals amongst visitors from outside Wales

Festival	**Number of attendees surveyed**	**Estimated spend from survey respondents outside of Wales**
Abergavenny	150	£4,110.68
Conwy	151	£9,129.45
Beaumaris	152	£369.11
Narberth	150	£992.64
Newport	151	£24.43
St Fagans	155	£254.95
Overall	**909**	**£14,881.26**

Extrapolating the average tourist spend per attendee by the combined attendance of all of the Welsh Government-funded festivals produces a figure of £3.1m. Once standard economic multipliers are applied, to represent the ripple effect of this added investment on the economy (as was done with the operational spend from festival organisers previously) the value of tourist spend associated with food festivals is given as £4.5m.

Note that Section 6.2.1 includes *all* of the attendee spend at the festivals, including tourists. The *additional* economic effect of tourism on top of this sum (i.e. excluding the sum that the tourists spent within the festivals themselves) is £3.7m.

6.3 Indirect Exhibitor Sales Influenced by Festival Attendance

As discussed previously, many exhibitors have indicated their belief that their presence at food festivals not only results in direct sales, but also leads to indirect benefits through marketing, networking, and research and development. This is very difficult to quantify and monetise. However, exhibitors were asked to estimate the proportion of their sales that they consider to be *"influenced by"* exhibiting at Welsh food festivals. Importantly, this includes sales made over the course of a financial year, so includes not only the sales made at the festival but also the sales/business generated as a result of exhibiting at a festival. Table 6.2 presents the results from this question, indicating that while around half of respondents attribute less than 20 per cent of their sales to food festivals, around 16 per cent of respondents attribute at least 40 per cent of their sales to food festivals. Therefore, although the effect of indirect sales will be minimal for many exhibitors, it can, in some cases, be quite substantial.

Table 6.2: Approximately, what proportion of your sales over a financial year would you say is "influenced by" your exhibiting at Welsh food festivals?

Proportion of sales influenced by food festivals	Count	Percentage
0–20%	131	52.4%
20–40%	43	17.2%
40–60%	16	6.4%
60–80%	8	3.2%
80–100%	15	6.0%
Don't know	37	14.8%
Total	**250**	**100%**

Based on information from 176 exhibitors who were also willing to provide turnover figures, respondents collectively attributed a total of £3.96m of sales to their attendance at food festivals. The 176 exhibitors who responded to these questions represent 19 per cent of the 930 exhibitors recorded for all Welsh Government-funded food festivals. When the average sales by traders are multiplied by the number of traders recorded, this equates to a total of £20.9m of gross sales influenced by food festivals across all businesses exhibiting at Welsh Government food festivals in 2015. Subtracting the £3.8m which the attendees were estimated to have spent at the festivals themselves would suggest that the indirect value of attending the food festival is £17.1m. Note that the figure is far greater than direct attendee spend at festivals and reflects the importance of the indirect, subsequent trade/sales generated following a food festival. However, this figure must be interpreted with extreme caution, as the true value of indirect benefits is very difficult to estimate and this analysis is based only on the perceptions of exhibitors.

6.4 Summary

To summarise, this chapter has tried to give some indication of the economic impact of food festivals. All of the estimates rely, to some degree, on assumptions and benchmarks. Within this, some estimates can be made with greater confidence than others. The ~£1.4 million resulting from operational spend by festival organisers is a relatively straightforward estimate, whereas the £3.8m spend from festival attendees and the additional £3.7m from tourist activity rest on the assumption that the six festivals visited this year are representative of all funded food festivals (having adjusted for attendance levels).

The most challenging estimate to make is the value of the festivals to the exhibitors. The direct benefit is the £3.8m that attendees are estimated to spend at the festivals. However, exhibitors indicated a range of other benefits which can accrue from attendance at food festivals, ranging from marketing to networking and product development. Interviews with exhibitors have suggested that this can, in some cases, account for a considerable portion of their annual sales. These indirect sales are tentatively estimated at £17m, though this figure is based on the perceptions of exhibitors and must be treated with caution.

7 Summary of findings

1. *Most exhibitors are micro-businesses and may only attend local food festivals*

When interpreting many of the findings which relate to exhibitors presented in this report, it is necessary to keep in mind their scale. Most exhibitors are self-employed, with the remainder employing only small numbers of staff. The 40 per cent of exhibitors with a turnover of less than £25,000 will struggle to provide a reasonable full-time wage even for the owner. The Action Plan contains a commitment to managing the development of SMEs within food and drink sectors (Action Point 14), and food festivals play an important role in this. Small producers would be expected to focus on developing local markets and minimise the costs of travelling to events outside of their target area, and this is what the results show, with most businesses attending just one Welsh Government-funded food festival as part of a mix of other (presumably local) events. Whilst local food festivals represent a low-cost channel through which SMEs can gain access to the food and drink marketplace (Action Point 23), direct assistance to small producers to overcome the costs of attending festivals outside of their immediate locality may warrant some consideration if appropriate to their business strategy.

2. *The strategic importance of food festivals for exhibitors may go beyond direct sales*

Despite the majority of exhibitors attending just one Welsh Government-funded food festival, the impact of attending the event can be quite far-reaching for exhibitors. Most exhibitors see festivals as an opportunity to promote and market their business as well as to make direct sales. The majority of exhibitors also report that they benefit from undertaking research and development activities. Therefore, whilst the direct sales made at the festivals are worth an estimated £3.8m to exhibitors, the indirect benefits may be just as valuable. Indeed, based on the perceptions of exhibitors, these indirect benefits could be worth as much as £17m. Whilst this figure must be treated with caution, there is clearly a *perception* amongst exhibitors that food festivals have a strategic importance which goes far beyond the transactions made on the day.

Food festivals therefore play a significant role in a range of valuable activities outside of direct sales mentioned in the Action Plan, including innovation (Action Point 20), skills development (Action Points 4 and 5), networking (Action Point 21), and the development of local and tourist markets (Action Point 31). However, there is variation in the extent to which exhibitors engage in these activities and there may be an opportunity to promote best practice in some of these areas (e.g. making sure that new customer details are recorded for future contact, testing, and gathering feedback around marketing (such as packaging, product names, price points)). Bringing to light exemplars of exhibitors who have a particularly sophisticated approach to these indirect elements may be of value, perhaps resulting in simple practical advice for food and drink businesses that wish to make the most of attending events.

3. *Food festivals effectively promote Welsh produce*

In addition to the immediate economic value of food festivals for exhibitors, localities and the Welsh economy, food festivals can also be seen as part of a wider agenda to promote Welsh food and drink. Action Point 36 of the Action Plan states that grant assistance may be provided to events which raise the profile of the Welsh food and drinks industry. Results from the evaluation have suggested that both the festival organisers and exhibitors do exactly this, and some exhibitors have given examples of how they've tried to explicitly associate their goods with the 'Welsh produce' brand. The Action Plan allows for this loose association, describing the Welsh Food and Drink brand as an 'umbrella brand', acknowledging that other brands can fit beneath this (such as local and regional brands which may develop into Protected Food Names, as mentioned in Action Point 27). There are also some natural opportunities to promote the Welsh language (Action Point 11), as assigning Welsh names to food and drink brands may underline their authenticity.

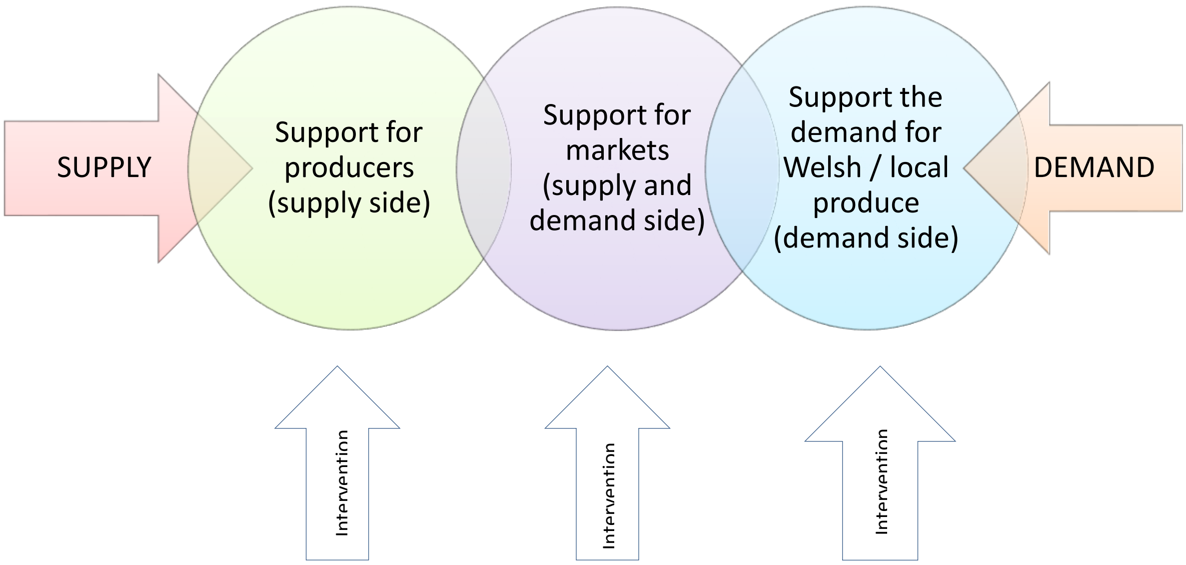
What is more, the attendees also overwhelmingly value the origin of their food and think that Wales is known for good-quality and great-tasting food. Food festival attendees are not necessarily representative of the wider public in this regard, nor does this suggest that food festivals are responsible for having created these attitudes (though attendees reporting their awareness of Welsh food has increased as a result of their attendance). However, that attendees so overwhelmingly share these values with exhibitors and organisers may indicate that the appeal of food festivals goes beyond the transactional, suggesting a broader cultural resonance. Conversely, from a promotional perspective, it could be argued that the food festivals, to some extent, preach to the converted, rather than making the case for Welsh produce to those who may currently be more apathetic towards the issue. For those who do value Welsh produce, there is also evidence that improving choices and access to food and drink when attendees return home (Action Point 45) may be important.

4. *Food festivals can cut across different policy areas*

The food festivals can arguably be segmented in any number of ways, but in interpreting the findings of this evaluation, an awareness of ‘place-based’ and ‘food-based’ festivals is of particular relevance. For example, that some festivals have a more general interest in promoting and developing their locality (‘place-based’) appears to explain why some festivals have diversified their activities, find the application procedure for grant funding to be narrow, and may actively encourage tourism. In turn, these festivals may have wider catchment areas and have developed greater loyalty to their event. Recognising that some festivals follow more ‘place-based’ strategies, of which food and drink is not the sole focus and may not be the ultimate end, is likely to be important for future policy development. Although ‘place-based’ events may be less neatly aligned with the objectives of the Welsh Government Food Division, they represent some of the most important events and most of the attendees at these festivals still report that food and drink is of central importance to their experience.

From the perspective of the Food Division, the Welsh food and drink sector may be supported at different points of the supply chain, from providing direct assistance to producers (supply-side interventions) to promoting demand for Welsh produce (demand-side interventions). Food events perhaps represent a unique type of intervention in that they sit neatly between the supply- and demand-side interventions, but are not the only strategy for supporting the food and drink market.

Figure 7.1: Points in the supply chain at which intervention could take place to support the Welsh food and drink sector



This underlines the importance for Welsh Government to take a joined-up approach to support provision. This is recognised, to some extent, in the Action Plan (Action Point 34), with the Food Division and Visit Wales collaborating on the Food Tourism Action Plan. However, the value of food festivals can cut across several government departmental areas to include economic development, tourism, regeneration, and community cohesion. There is a compelling economic justification for supporting food festivals, and arguably a cultural one too, but this argument is, in some cases, made most powerfully by acknowledging the broader role that the festivals may play.

Annex A – Individual Festival Summaries

In order to learn more about the characteristics of each festival, a short festival summary was created. All profiles look at the demographic make-up of each festival, the awareness and attraction of the festival, general feedback on the event, and the overall impact of the event.

Abergavenny Food Festival

Introduction

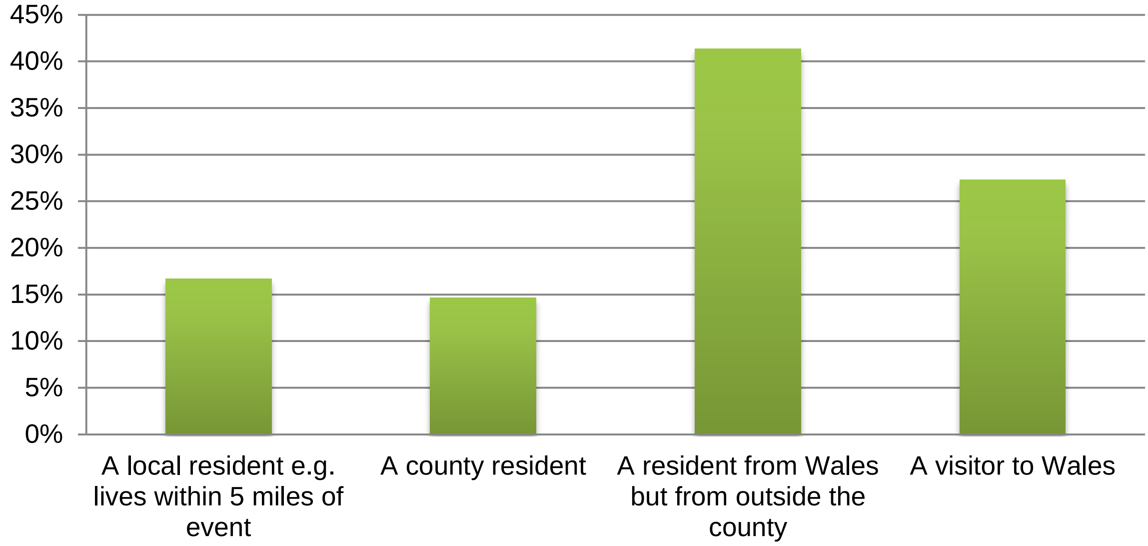
Wavehill were able to speak to 150 visitors at the 2015 Abergavenny Food Festival. This report evaluates the visitor responses and examines the findings in further detail. Please refer to evidence within the main report for comparison with the average response from visitors across the surveyed food festivals.

The 2015 Abergavenny festival took place on the 18th, 19th and 20th of September and the weather was sunny and overcast. Out of the 150 visitors spoken to, 59 per cent (89/150) were female and 41 per cent (61/150) were male. Sixty-three per cent (94/150) of respondents said that they were employed, 17 per cent (25/150) said that they were retired, 15 per cent (22/150) said that they were self-employed, 4 per cent (6/150) said that they were students, and 1 per cent said that they were either unemployed, an unpaid family worker or that they were unable to work due to a long-term illness or disability.

Attendee and Visitor Profiles

Survey respondents were asked whether they were a local or county resident, a resident from Wales but outside the county, or a visitor to the area. Overall, 17 per cent (25/150) of those surveyed were local residents, 15 per cent (22/150) were residents of the county, and 41 per cent (62/150) were residents from Wales but from outside the county. The festival also has a relatively high proportion of festival attendees from outside Wales (27 per cent; 41/150).

Figure A1.1: The proportion of visitors who were a local resident, county resident or visitor



Base: n=150

During the survey, respondents were asked for their postcodes, which were used to plot the location from which they had travelled. As Figure A1.2 illustrates, the majority of visitors came from South Wales, but many also came from all across the UK, with a few from overseas.

Figure A1.2: Map of plotted postcodes given by those interviewed

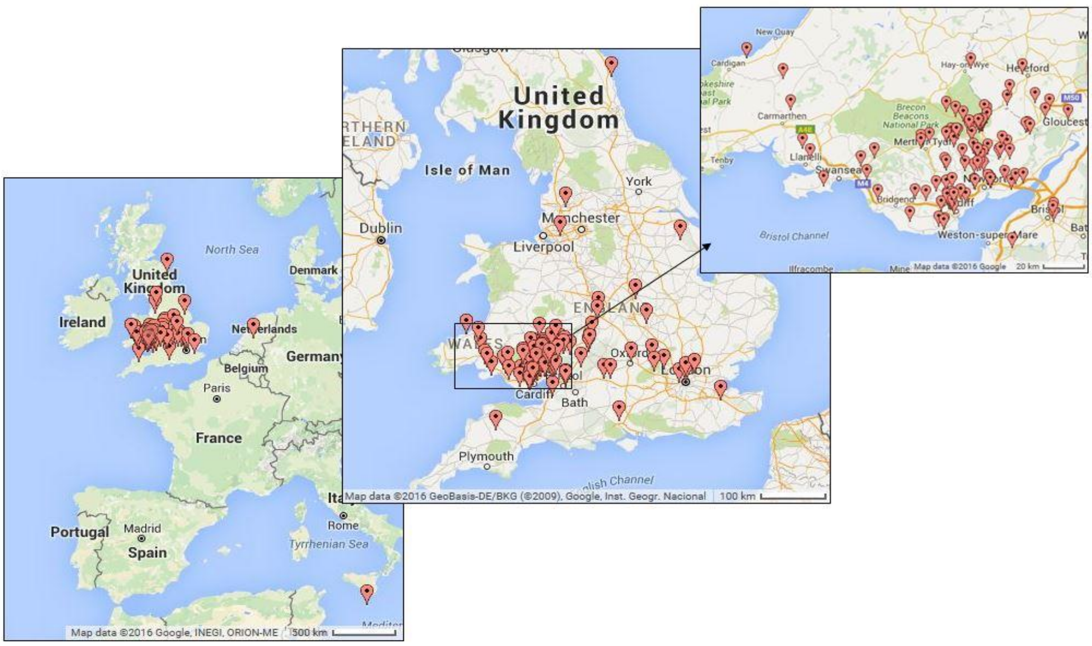
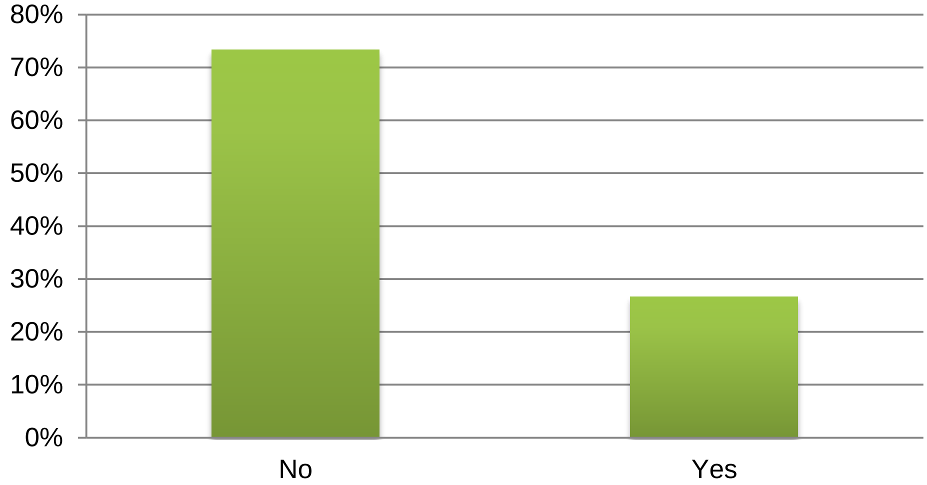


Figure A1.3 demonstrates that 27 per cent (40/150) of attendees were visiting a food festival in Wales for the first time. Those 110 who had been to another food festival in Wales were asked whether this had been in the last 12 months — 35 per cent (39/110) said that it had.

Figure A1.3: Is this the first time you have attended a food festival in Wales?

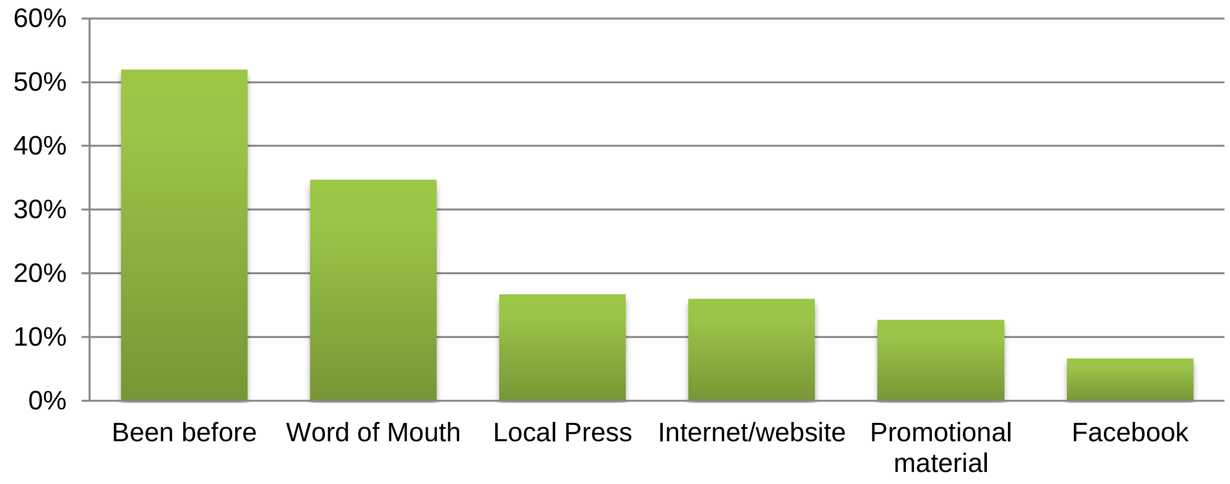


Base: n=150

Awareness and Attraction of the Food Festival

Visitors were asked how they became aware of Abergavenny Food Festival. Figure A1.4 highlights that 52 per cent (78/150) of respondents were aware of the food festival as they had been before. Thirty-five per cent (52/150) had heard about the festival through word-of-mouth, which suggests that the experience of previous attendees has an important influence on attendance levels.

Figure A1.4: How did you hear about the festival?



Base: n=150. Note: the figure shows responses cited by a minimum of 5 per cent of respondents, and respondents could give more than one response.

To explore this further, respondents were then asked to stipulate the factors that most influenced their decision to come to Abergavenny Food Festival. Figure A1.5 shows the influential factors.

Figure A1.5: What factors most influenced you to come to the festival today?

Base: n=150. Note: the figure shows responses cited by a minimum of 5 per cent of respondents, and respondents could give more than one response.

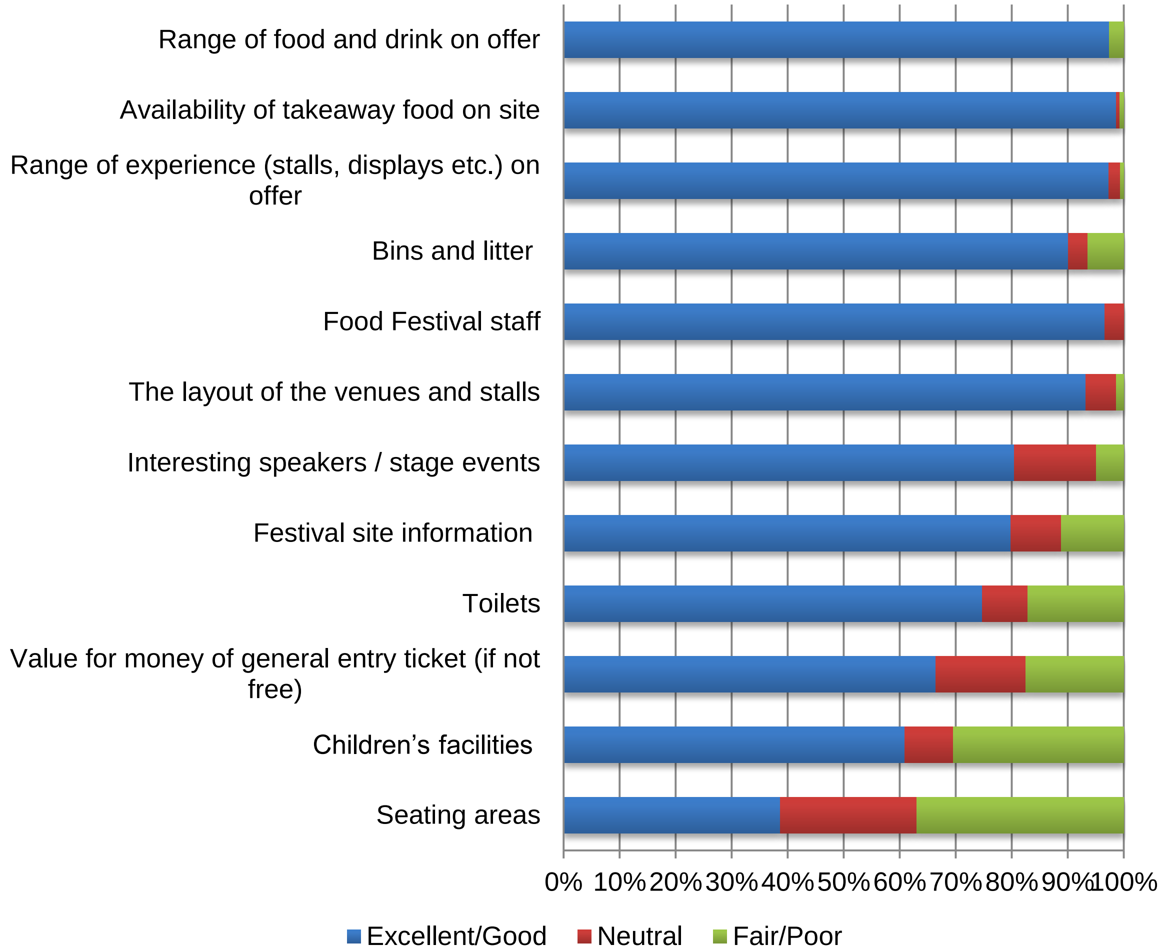
Festival Feedback

Respondents were asked to rate on a scale of one to four (one being *"not enjoying it at all"* and four being *"really enjoying it"*) how much they were enjoying the Abergavenny Food Festival. Eighty-four per cent of respondents gave the festival a score of four out of four ('excellent'), and the remaining respondents rated the score three out of four ('good').

Respondents were asked to rate the Abergavenny Food Festival using a five-point scale, from excellent through to poor, against a series of criteria.

Figure A1.6 illustrates the spread of responses against each criterion and highlights that, in most instances, the vast majority of respondents described the elements as either excellent or good.

Figure A1.6: How would you rate the festival in terms of the following?



Base: n = ranges from 16 to 99 (those who responded with "can't answer" were excluded from the analysis). It should be noted that "takeaway food" is not necessarily takeaway food in its traditional sense, but may be 'food to go' made from quality produce.

Impact of the Food Festival

County residents were asked to rate on a scale of one to four how much the festival influenced their decision to come to Abergavenny today (one being *"it did not influence my decision at all"* and four being *"it was the main influence on my decision"*), and results showed that 72 per cent (34/47) of county residents said that the festival was the main influence on their decision to visit Abergavenny that day.

The highest proportion of visitors (40 per cent; 60/150) planned to stay at the festival for the whole day, 36 per cent (54/150) said that they planned to stay at the festival for part of the day, and 24 per cent (36/150) were planning to stay at the festival for more than one day. Expected spend at the festival was high, with 38 per cent (57/150) of people planning to spend between £50 and £100, and 17 per cent (26/150) planning to spend over £100.

Respondents were asked how much they expected to spend in the local area, not including the food festival. The highest proportion said that they would spend nothing (13 per cent; 71/150) but the remaining people thought that they would spend some money locally, typically between £19 and £50.

Respondents were asked how long they would be visiting Abergavenny for, and where they would be staying (if they were there for more than one day). Table A1.1 demonstrates that the majority of those who answered this question were in Abergavenny for a day visit (69 per cent; 71/103).

Table A1.1: How long are you staying in the area?

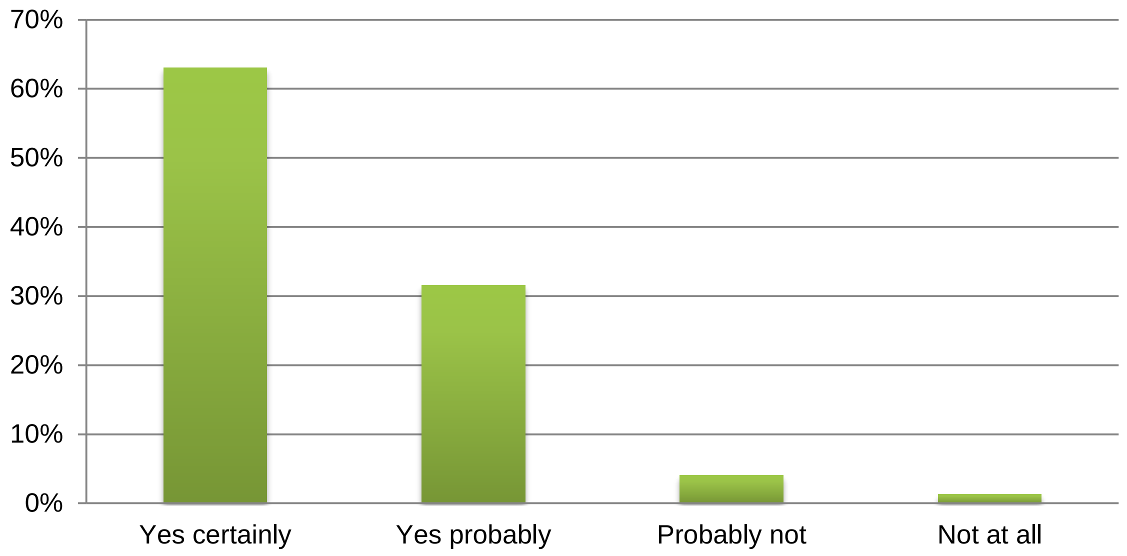
	N	**Percentage**
Day visit	71	69%
Staying over	32	31%

Base: n=103

Attitudes of Abergavenny Food Festival Visitors

Surveyed attendees at the food festival were asked if their visit to the food festival had increased their awareness of local food and produce — 95 per cent of respondents felt that it had (with 63 per cent replying with “yes, certainly” and a further 32 per cent replying with “yes, probably”).

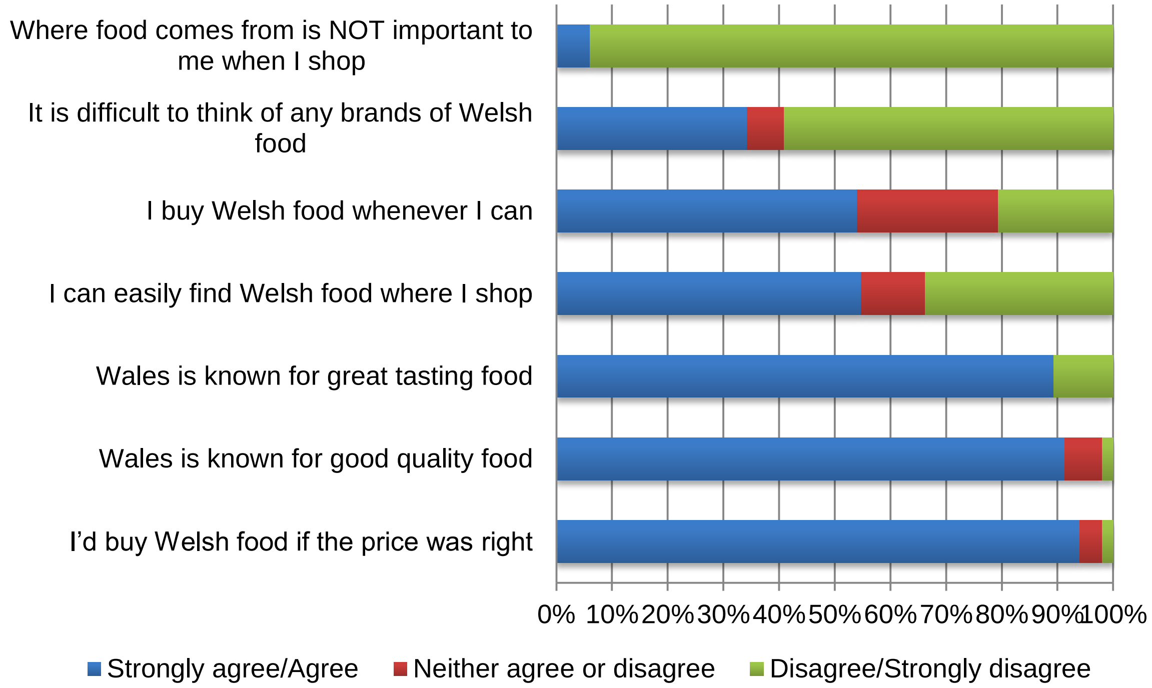
Figure A1.7: Has attending the food festival increased your awareness of local food and produce?



Base: n=149 (one respondent didn't provide an answer)

Respondents were then asked the extent to which they agreed with a series of statements about Welsh food, and these results are shown in Figure A1.8.

Figure A1.8: To what extent do you agree with the following statements?



Base: n = ranges from 148 to 150

To conclude, respondents were asked if they had any final comments. Typical responses given can be seen below:

"A lot of the producers are outside of Wales."

"Admission too expensive."

"Amazing how they have set it out. Parking is easy."

"Did not state on map where fish section was, or where any particular section was."

"I think it's really well done - there's something for everybody."

"It would have been good to receive a brochure when purchasing tickets online. When I walked in I only discovered the brochure by accident."

"More seating areas needed. It would be handy if you were given a free pamphlet map when you come in."

"There is a lot of variety and it really does portray Welsh food / farmers in a positive light."

"Very good event. Well organised. Great tourist attraction. Puts it on the map."

"Where to buy wrist bands was complicated - not enough guidance."

Beaumaris Food Festival

Introduction

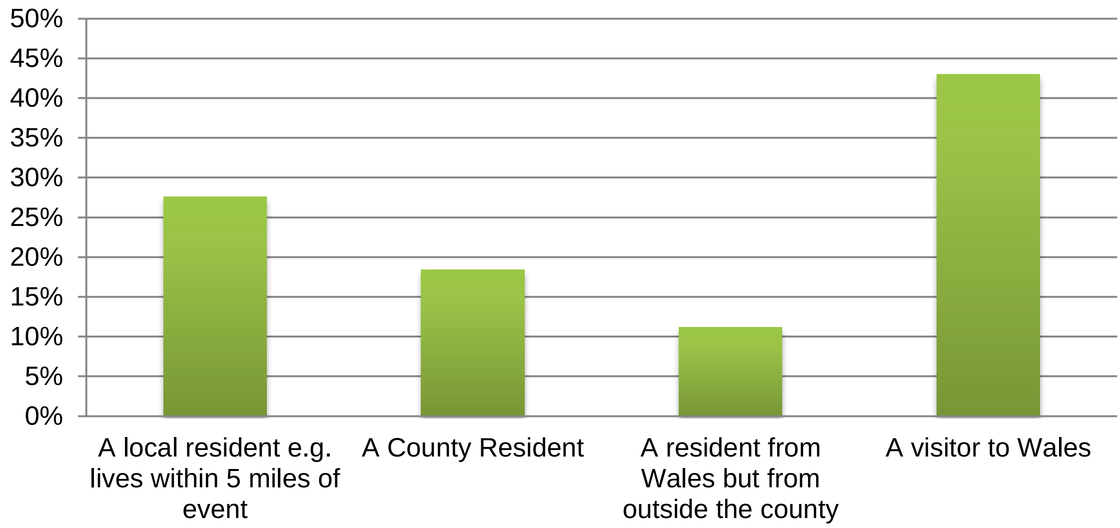
Wavehill spoke to 152 visitors at the 2015 Beaumaris Food Festival. This report evaluates the visitor responses and examines the findings in further detail. Please refer to evidence within the main report for comparison with the average response from visitors across the surveyed food festivals.

The 2015 Beaumaris festival took place on the weekend of the 12th–13th of September and the weather was sunny and overcast. Out of the 152 visitors, 41 per cent (62/152) were male and 59 per cent (90/152) were female. Sixty-four per cent (97/152) of festival visitors we spoke to were employed, 21 per cent (32/152) were retired, 9 per cent (14/152) were self-employed, 4 per cent (6/152) were students, two were unpaid family workers, and one was unemployed.

Attendee and Visitor Profiles

Survey respondents were asked whether they were a local or county resident or a visitor to the area. Forty-three per cent of those surveyed were a visitor to Wales (65/152), though over a third (28 per cent) lived within five miles of the event, showing the mix of local people and holidaymakers which attend the event.

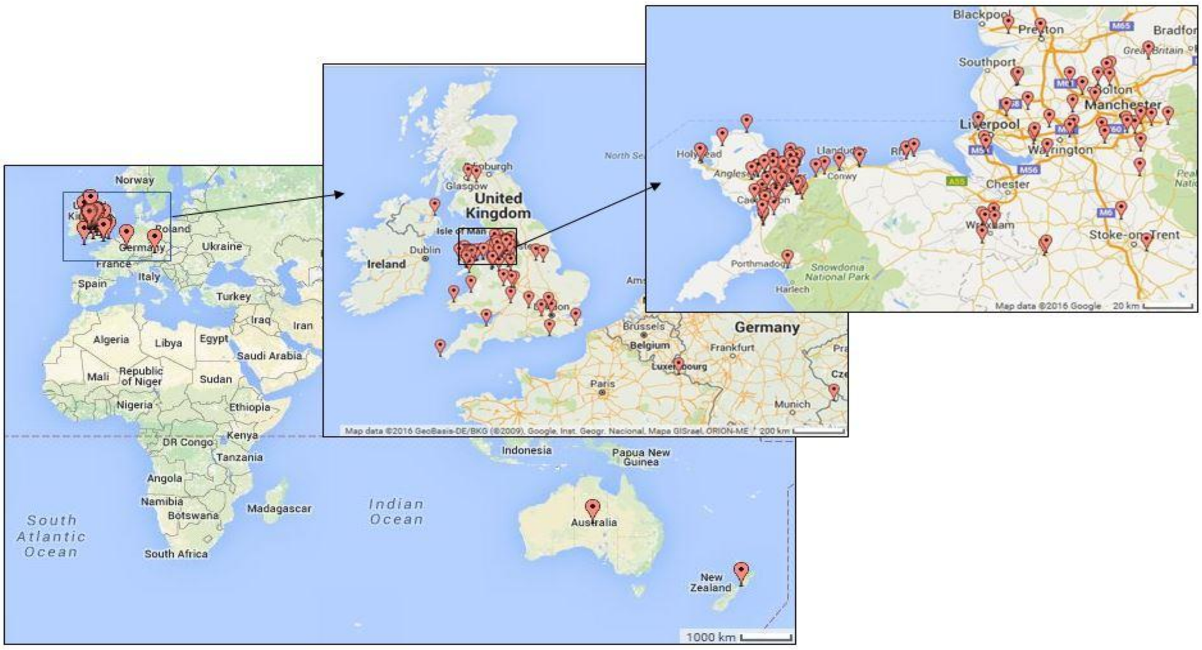
Figure A2.1: The proportion of visitors who are a local resident, county resident or visitor



Base: n=152

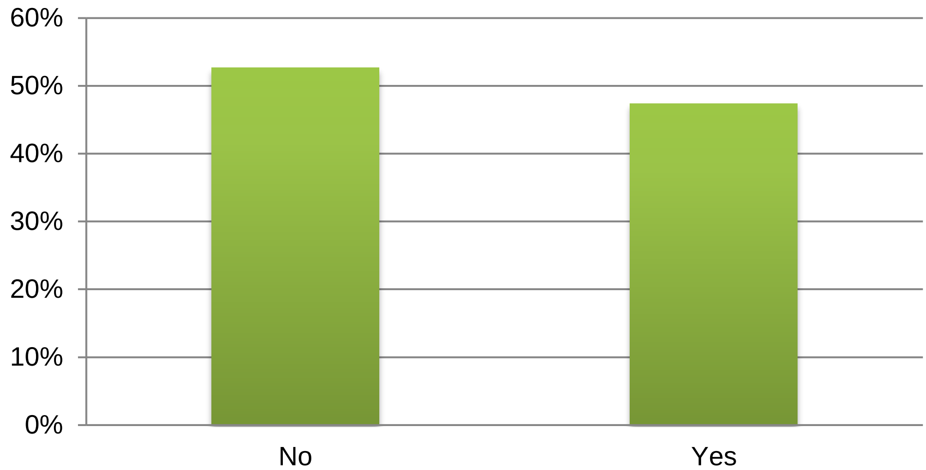
The map below in Figure A2.2 plots the postcodes given by the visitors.

Figure A2.2: Map of plotted postcodes given by those interviewed



Attendees were asked whether it was the first time that they had attended a food festival in Wales. Figure A2.3 shows that, overall, 53 per cent (80/152) of visitors to Beaumaris Food Festival had attended a food festival in Wales on a previous occasion.

Figure A2.3: Is this the first time you have attended a food festival in Wales?

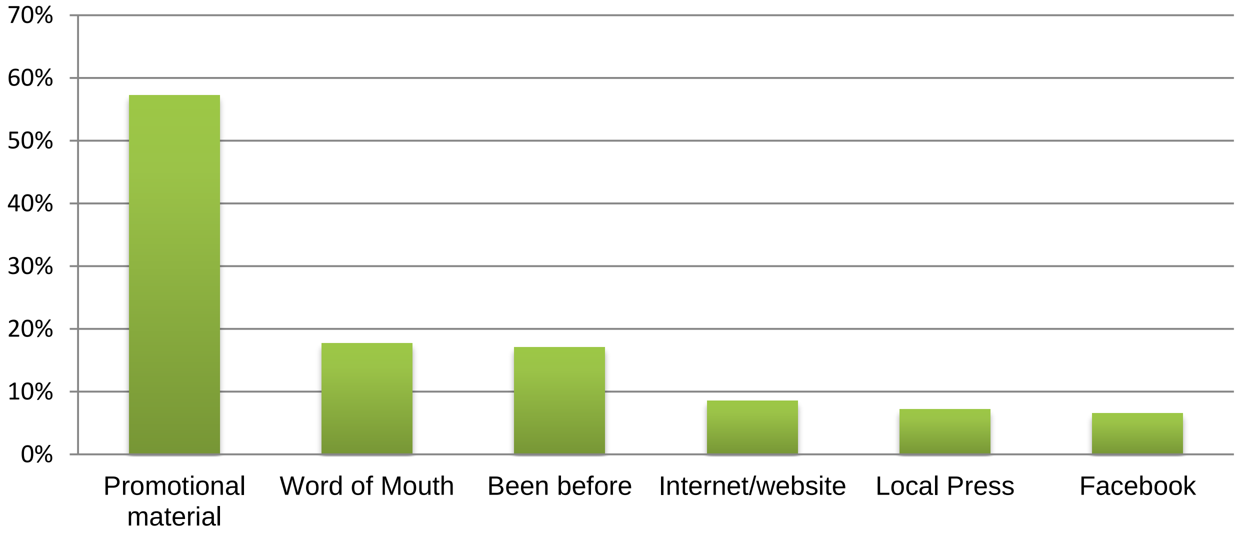


Base: n=78

Awareness and Attraction of the Food Festival

Visitors were asked how they became aware of Beaumaris Food Festival. Figure A2.4 shows that 57 per cent (87/152) of respondents had seen promotional material.

Figure A2.4: How did you hear about the festival?



Base: n=152

To explore this further, respondents were then asked to stipulate the factors that most influenced their decision to come to Beaumaris Food Festival. Figure A2.5 shows that buying local food and drink and the location were the most influential factors to the people we spoke to.

Figure A2.5: What factors most influenced you to come to the festival today?

Base: n=152. Note: the percentages total over 100 per cent, as respondents could give more than one answer.

Festival Feedback

Respondents were asked to rate on a scale of one to four (one being *"not enjoying it at all"* and four being *"really enjoying it"*) how much they were enjoying Beaumaris Food Festival. Sixty-five per cent (98/150[13]) of respondents said that they were really enjoying it. Only four respondents gave a low score of one or two, and these were asked to explain their reasons for this score. They are listed below:

"It's not as good as last year, it's on a much smaller scale and you've still got to pay as much to get in so I'm disappointed."

"The biggest downside is there's plenty of people selling food but nowhere to seating areas. It was much better last year in the streets - there seemed to be more stalls and people."

"There's no seating here and I have trouble walking far or being on my feet for long. There's no seafood here and we're right on the Menai Straits where they harvest mussels, etc."

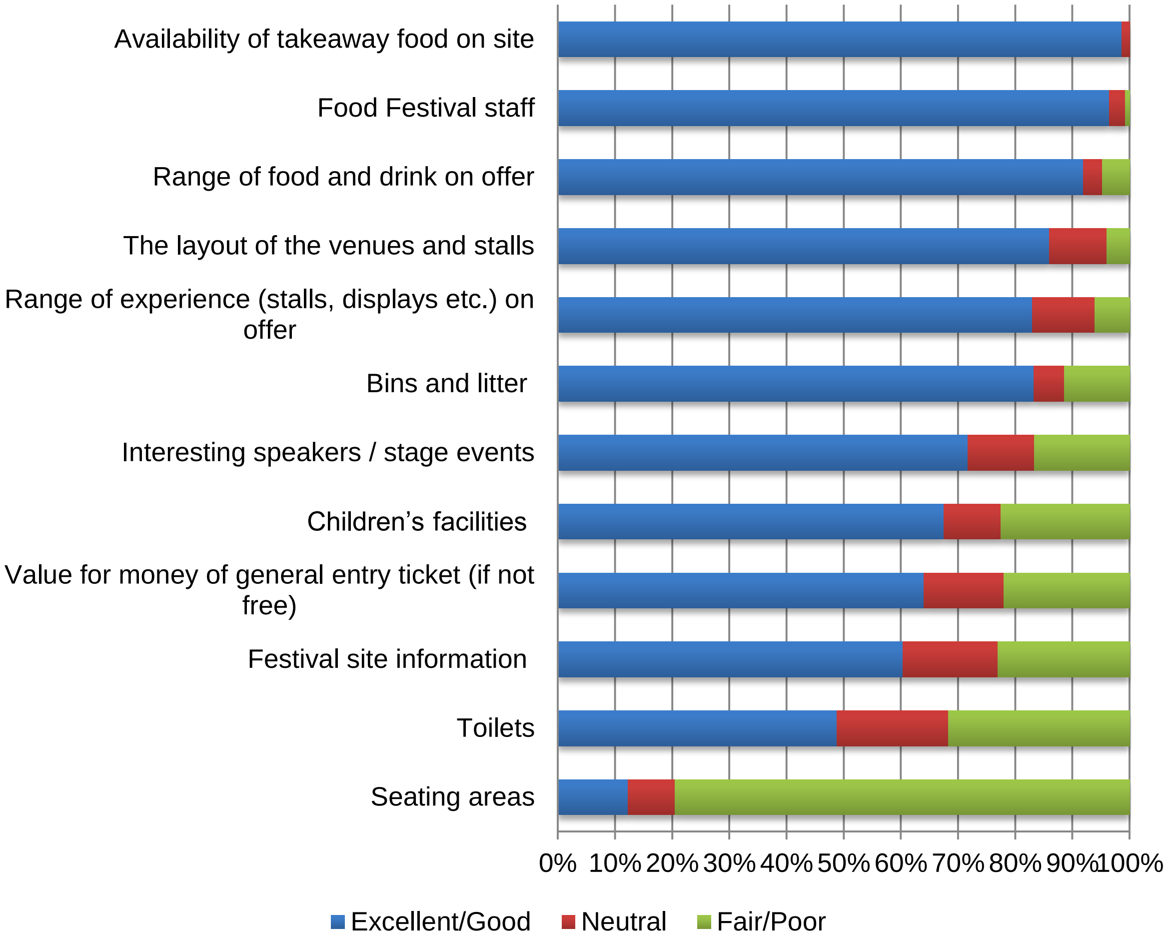
[13] Two respondents could not give a score.

“Too many bits and pieces. Need more fish and meat places. We can get this food where we shop. Thought it'd be bigger.”

Respondents were then asked to rate the festival (from excellent to poor) against a series of criteria.

Figure A2.6 below maps the spread of responses against each criterion and highlights that for most criteria the vast majority of respondents described the elements as either excellent or good, although a noticeable number of respondents rated the festival site information as poor. It should be noted that “takeaway food” is not necessarily takeaway food in its traditional sense, but may be ‘food to go’ made from quality produce.

Figure A2.6: How would you rate the festival in terms of the following?



Base: n = ranges from 40 to 150 (those who responded with "can't answer" were excluded from the analysis)

Impact of the Food Festival

County residents were asked to rate on a scale of one to four (one being *"it did not influence my decision at all"* and four being *"it was the main influence on my decision"*) how much the festival influenced their decision to come to Beaumaris today, and results showed that 92 per cent (65/70) of county residents said that the festival was the main influence on their decision to visit Beaumaris today.

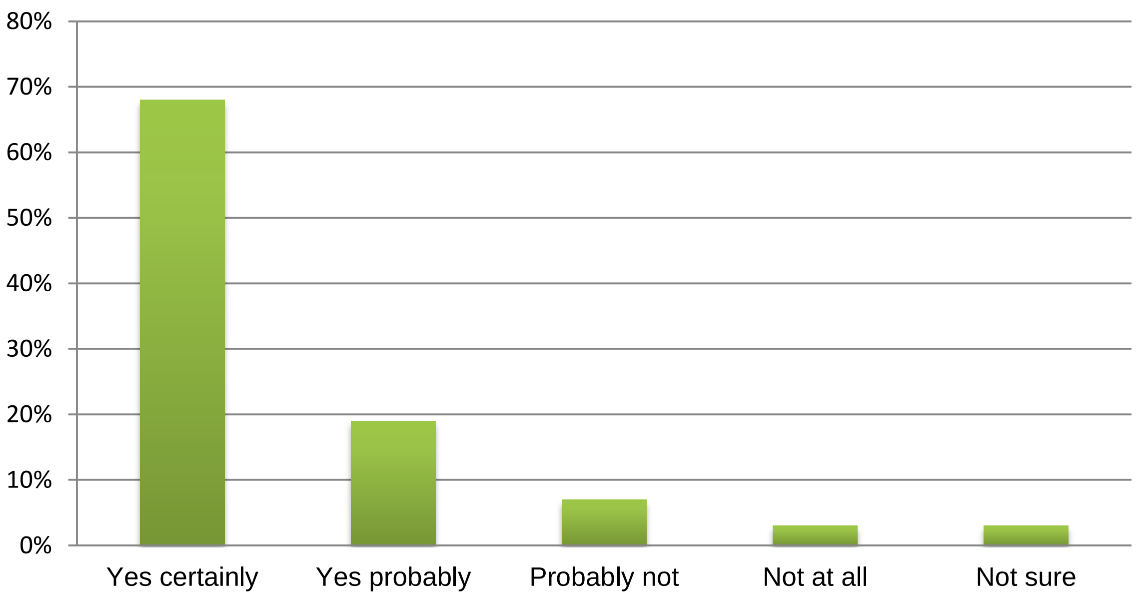
The highest proportion of visitors planned to stay at the festival for part of the day, with only 15 per cent (23/152) saying that they planned to stay for the whole day. Forty-five per cent (68/152) of people planned to spend between £25 and £50, with 20 per cent (30/152) saying that they planned to spend over £50.

Respondents were asked how much they expected to spend in the local area, not including the food festival. Although 24 per cent (36/152) said that they would be spending nothing, others thought that there would be some local spend, with the highest proportion saying that they planned to spend between £10 and £20.

Attitudes of Beaumaris Food Festival Visitors

Sixty-eight per cent (103/152) of respondents said that they were certain that their attendance at the food festival had increased their awareness of local food and produce, with a further 19 per cent (29/152) saying that it had probably increased their awareness.

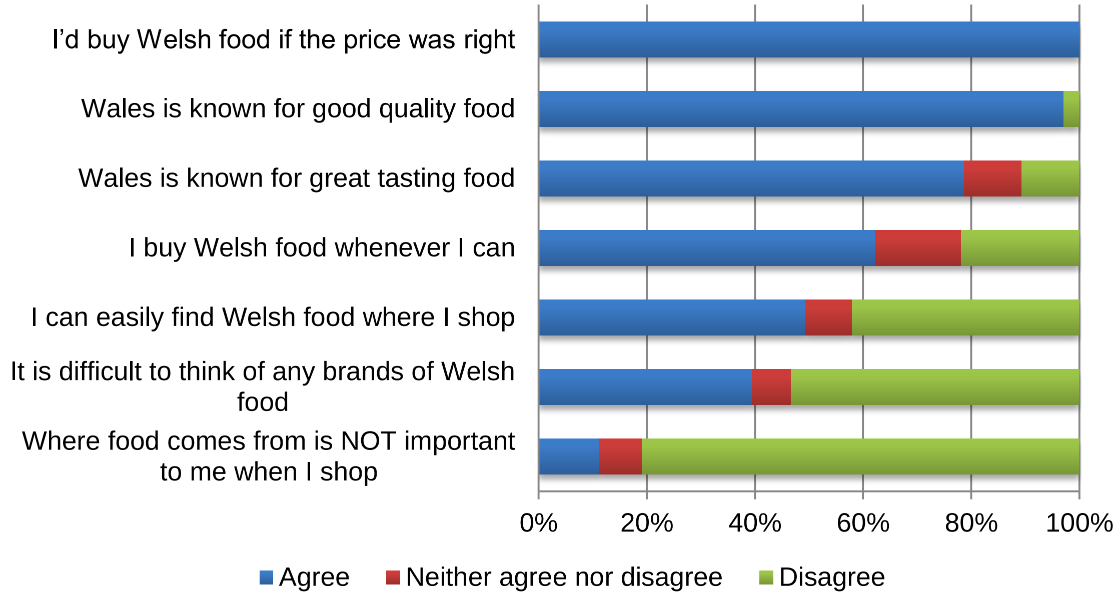
Figure A2.7: Has attending the food festival increased your awareness of local food and produce?



Base: n=152

Respondents were asked the extent to which they agreed with a series of statements about Welsh food, and these results are shown in Figure A2.8. The results are, on the whole, positive about Welsh food, but respondents were less sure where they could buy or what Welsh brands existed.

Figure A2.8: To what extent do you agree with the following statements?



Base: n = ranges from 136 to 152

To conclude, respondents were asked if they had any final comments. Typical responses given can be seen below:

"A map is needed to show what stalls are where. I prefer it all on one site like it is this year."

"Could be more children's facilities and would have been nice to have a site map."

"Everything is really good, more seating please, lovely day out; craft tent is a nice addition. Need more Welsh beers."

"Friendly, well organised, good parking. It's a great idea, good way of getting different things together. Nice that they have some craft stalls."

"Hope they get it right next year. If the format is the same I don't think we'll bother. There were a lot more stalls and bigger variety last year."

"I would like to see more sea food stalls."

"I'd like to see more organic foods - there's a huge drive towards that - I expected more than there is."

"It's good and will bring benefit to the area."

"It's not as good as last year, it's on a much smaller scale and you've still got to pay as much to get in so I'm disappointed."

“Need more seating - it's an improvement on last year because it's bigger and has a better layout, more spacious.”

“They could do with a map/leaflet so you know what times things are on like the cookery demonstrations, etc.”

Conwy Food Festival

Introduction

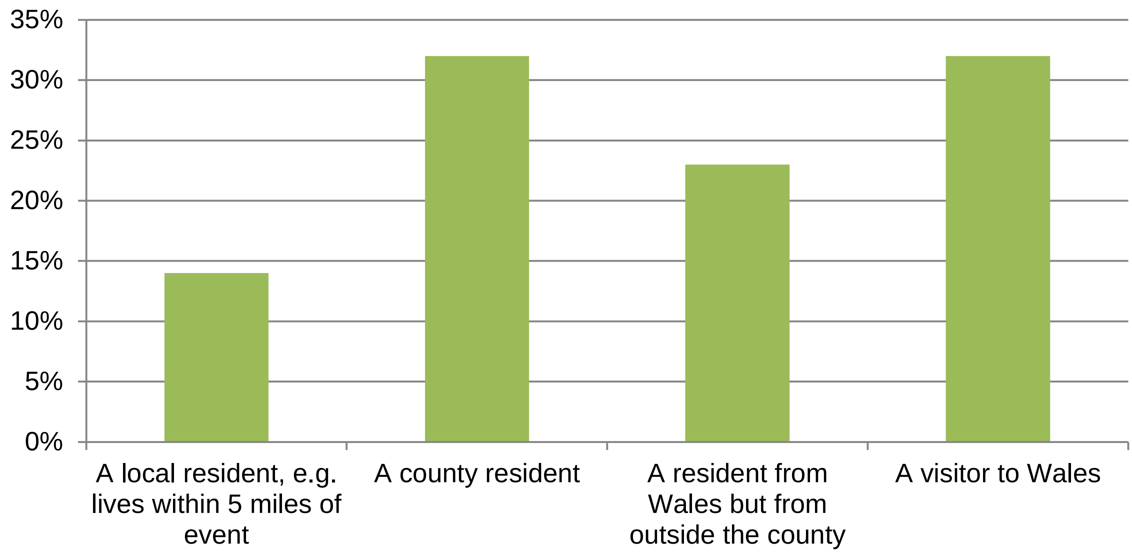
Wavehill were able to speak to 151 visitors at the 2015 Conwy Food Festival. This report evaluates the visitor responses and examines the findings in further detail. Please refer to evidence within the main report for comparison with the average response from visitors across the surveyed food festivals.

The 2015 Conwy festival took place on the weekend of the 24th–25th of October and the weather was mixed, with sunshine and showers. Out of the 151 visitors, 52 per cent (79/151) were male and 48 per cent (72/151) were female. Two-thirds of the people we spoke to were in employment (66 per cent; 99/151), 13 per cent (19/151) were retired, 10 per cent (15/151) were self-employed, 10 were students, and eight were unemployed.

Attendee Profiles

Survey respondents were asked whether they were a local or county resident or a visitor to the area. Only 14 per cent (21/151) of visitors to the festival lived locally (within 5 miles), and the highest proportion of visitors were either county residents or visitors to Wales.

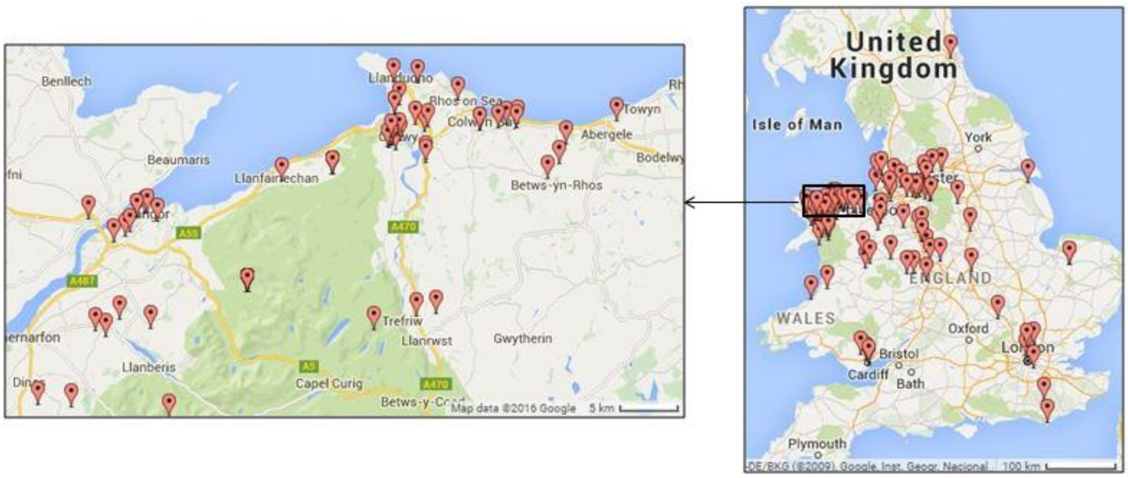
Figure A3.1: The proportion of visitors who are a local resident, county resident or visitor



Base: n=151

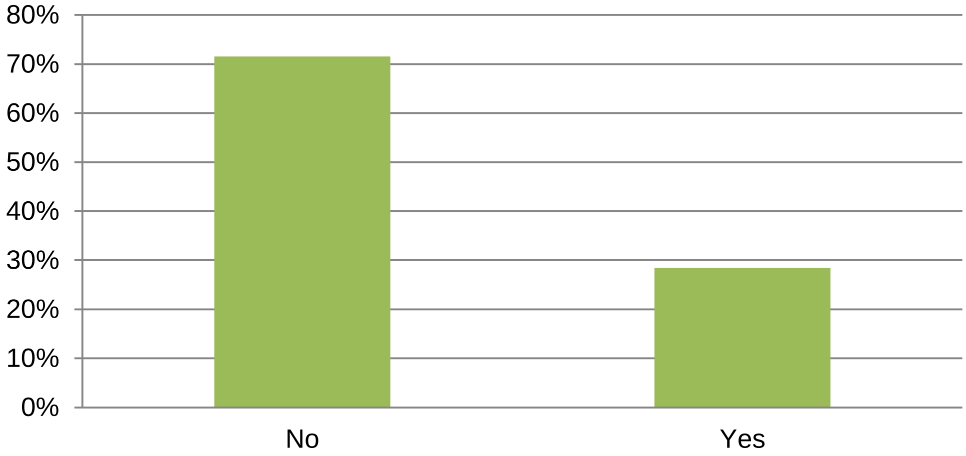
The map below in Figure A3.2 plots the postcodes given by the visitors.

Figure A3.2: Map of plotted postcodes given by those interviewed



Attendees were then asked if it was the first time that they had attended a food festival in Wales. Figure A3.3 shows that, overall, 72 per cent (108/152) of visitors to Conwy Food Festival had attended a food festival in Wales on a previous occasion.

Figure A3.3: Is this the first time you have attended a food festival in Wales?

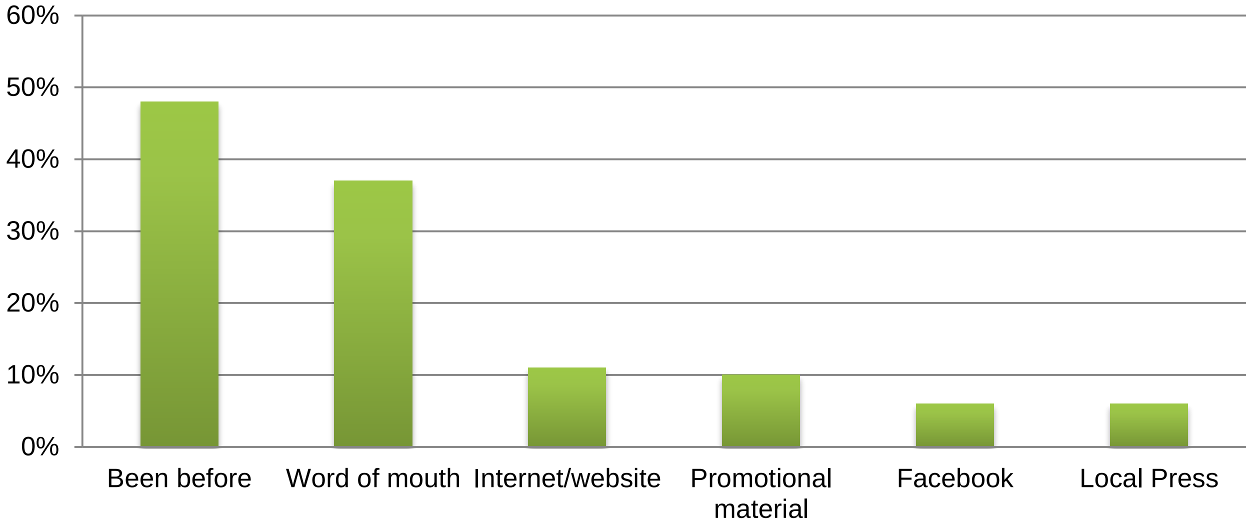


Base: n=151

Awareness and Attraction of the Food Festival

Visitors were asked how they became aware of Conwy Food Festival. Figure A3.4 highlights that 57 per cent (87/152) of respondents had previously attended the festival. The highest proportion of visitors had either been to the festival before (48 per cent; 72/151) or heard through word-of-mouth (37 per cent; 56/151).

Figure A3.4: How did you hear about the festival?



Base: n=151

To explore this further, respondents were then asked to stipulate the factors that most influenced their decision to come to Conwy Food Festival. Figure A3.5 shows that the influential factors were the reputation of the event and to buy local food and drink.

Figure A3.5: What factors most influenced you to come to the festival today?

Base: n=151. Note: the percentages total over 100 per cent, as respondents could give more than one answer.

Festival Feedback

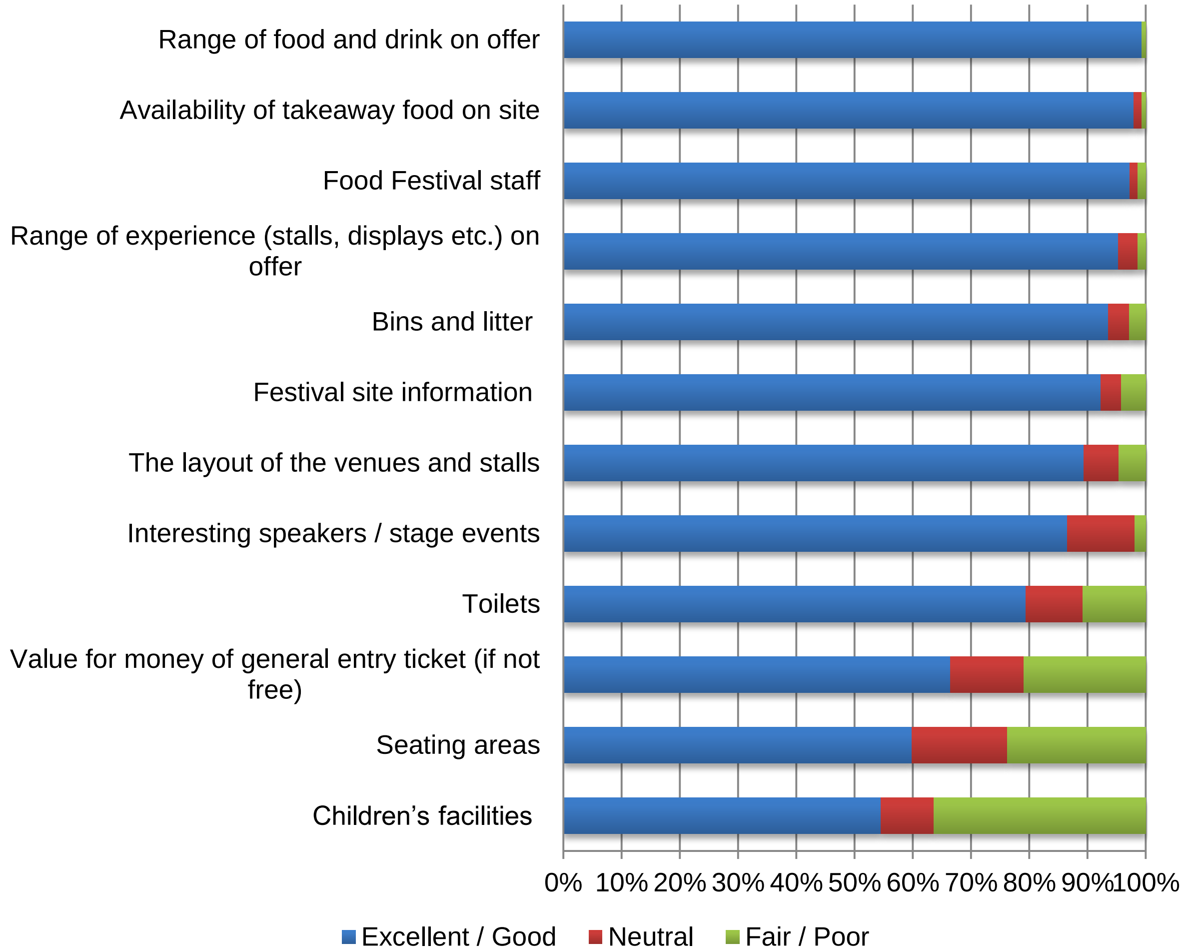
Respondents were asked to rate on a scale of one to four (one being *"not enjoying it at all"* and four being *"really enjoying it"*) how much they were enjoying Conwy Food Festival. Ninety-seven per cent (147/151) of respondents said that they were either "enjoying it" or "really enjoying it". Two respondents gave a low score of one or two, and these were asked to explain their reasons for this score. They are listed below:

"Lack of organisation of stewards; I'd pre-booked tickets and when I asked them where to go they sent me the wrong way."
"Expensive."

Respondents were then asked to rate the festival (from excellent to poor) against a series of criteria.

Figure A3.6 below maps the spread of responses against each criterion and highlights that for most criteria the vast majority of respondents described the elements as either excellent or good, although a noticeable number of respondents (28 per cent; 19/69) rated the festival site information as poor. It should be noted that "takeaway food" is not necessarily takeaway food in its traditional sense, but may be 'food to go' made from quality produce.

Figure A3.6: How would you rate the festival in terms of the following?



Base: n = ranges from 11 to 151 (those who responded with "can't answer" were excluded from the analysis)

Impact of the Food Festival

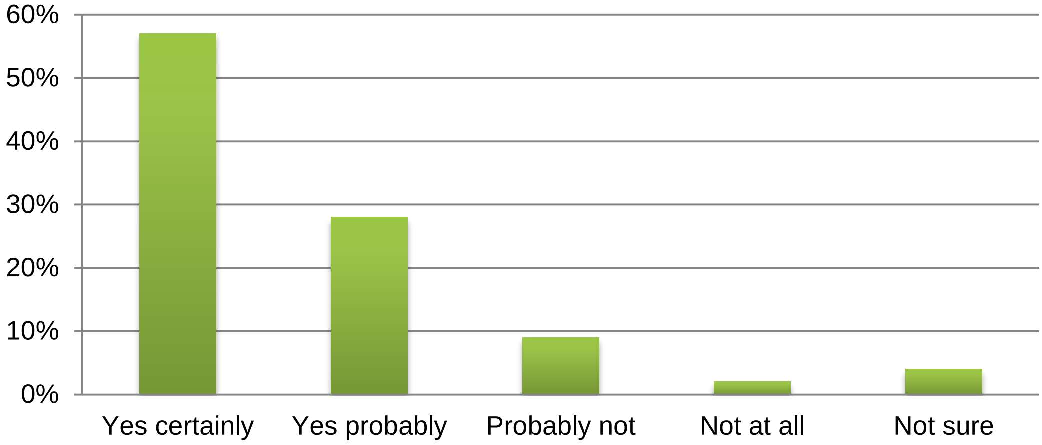
County residents were asked to rate on a scale of one to four (one being *"it did not influence my decision at all"* and four being *"it was the main influence on my decision"*) how much the festival influenced their decision to come to Conwy today, and results showed that 81 per cent (57/70) of county residents said that the festival was the main influence on their decision to visit Conwy today.

Just over half (52 per cent; 78/151) of all visitors spoken to planned to stay at the festival all day, with 35 per cent (53/151) planning to stay part of the day and 13 per cent (20/151) planning to stay more than one day. The highest proportion (34 per cent; 51/151) of visitors expected to spend between £25 and £50, but some planned to spend much more than that, with, for example, 11 per cent (17/151) of visitors planning to spend over £100.

Attitudes of Conwy Food Festival Visitors

Surveyed attendees at the food festival were asked if they thought that attending a Welsh food festival increased their awareness of local food and produce. Fifty-seven per cent (86/151) of respondents said that they were certain that their attendance at the food festival had increased their awareness of local food and produce, with a further 28 per cent (43/151) saying that it had probably increased their awareness.

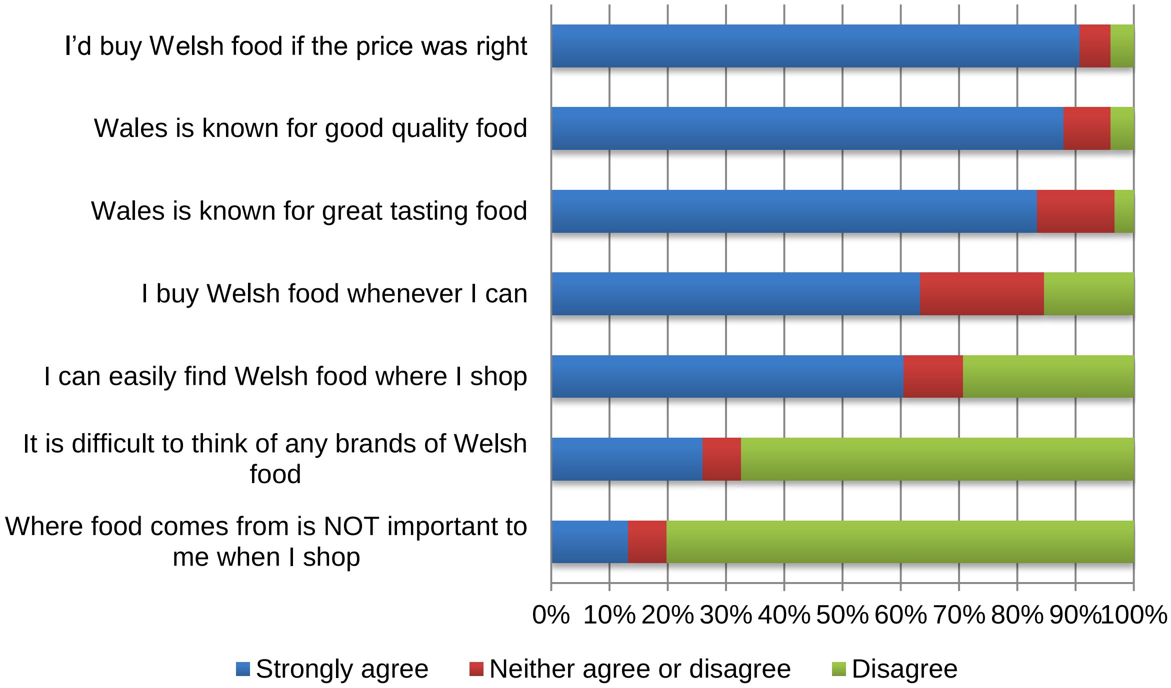
Figure A3.7: Has attending the food festival increased your awareness of local food and produce?



Base: n=151

Respondents were then asked the extent to which they agreed with a series of statements about Welsh food, and these results are shown in Figure A3.8.

Figure A3.8: To what extent do you agree with the following statements?



Base: n = ranges from 147 to 151

To conclude, respondents were asked if they had any final comments. Typical responses given can be seen below:

“Best event of the year. Great food and great atmosphere.”

“Better than last year - less stalls. It was too crowded last year.”

“Can't believe the amount of food and drink on offer, really good value.”

“Easy parking. We are enjoying it despite the rain.”

“Entry fee is too expensive. I would like to know where all the ticket money goes.”

“Good value and very friendly location.”

“It's brilliant, and bigger than what we expected. Amazing street food. High entry price.”

“It's ok but it's gone too commercialised. It's too busy now. Needs to be spread out more.”

“Too many stands from outside of Wales - not marketing Welsh produce effectively.”

Narberth Food Festival

Introduction

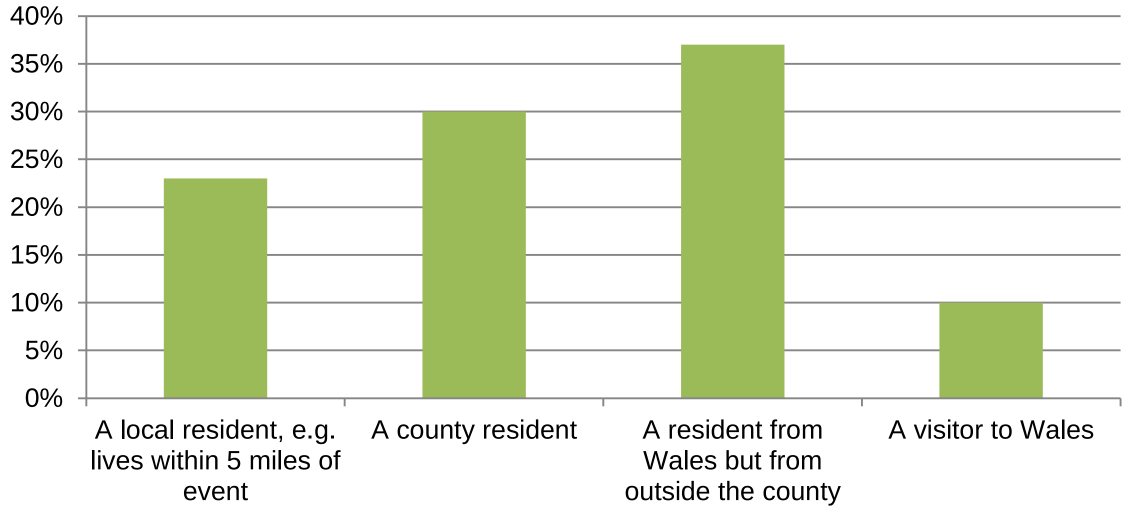
Wavehill were able to speak to 150 visitors at the 2015 Narberth Food Festival. This report evaluates the visitor responses and examines the findings in further detail. Please refer to evidence within the main report for comparison with the average response from visitors across the surveyed food festivals.

The 2015 Narberth festival took place from the 26th to 27th of September and the weather was sunny. Out of the 150 visitors spoken to, 71 per cent (106/150) were female and 29 per cent (44/150) were male. Forty-seven per cent (71/150) of respondents said that they were employed, 26 per cent (40/150) said that they were retired, 15 per cent (23/150) said that they were self-employed, 7 per cent (10/150) said that they were students, and the remaining visitors we spoke to were unable to work due to a long-term illness or disability or were an unpaid family worker.

Attendee and Visitor Profiles

Survey respondents were asked whether they were a local or county resident, a resident from Wales but outside the county, or a visitor to the area. The highest proportion (37 per cent; 55/150) of visitors we spoke to were a resident of Wales but from outside the county.

<u>Figure A4.1: The proportion of visitors who were a local resident, county resident or visitor</u>



Base: n=150

During the survey, respondents were asked for their postcodes, which were used to plot the location from which they had travelled. As Figure A4.2 illustrates, the majority of visitors came from South Wales, but many also came from all across the UK, with a few from overseas.

Figure A4.2: Map of plotted postcodes given by those interviewed

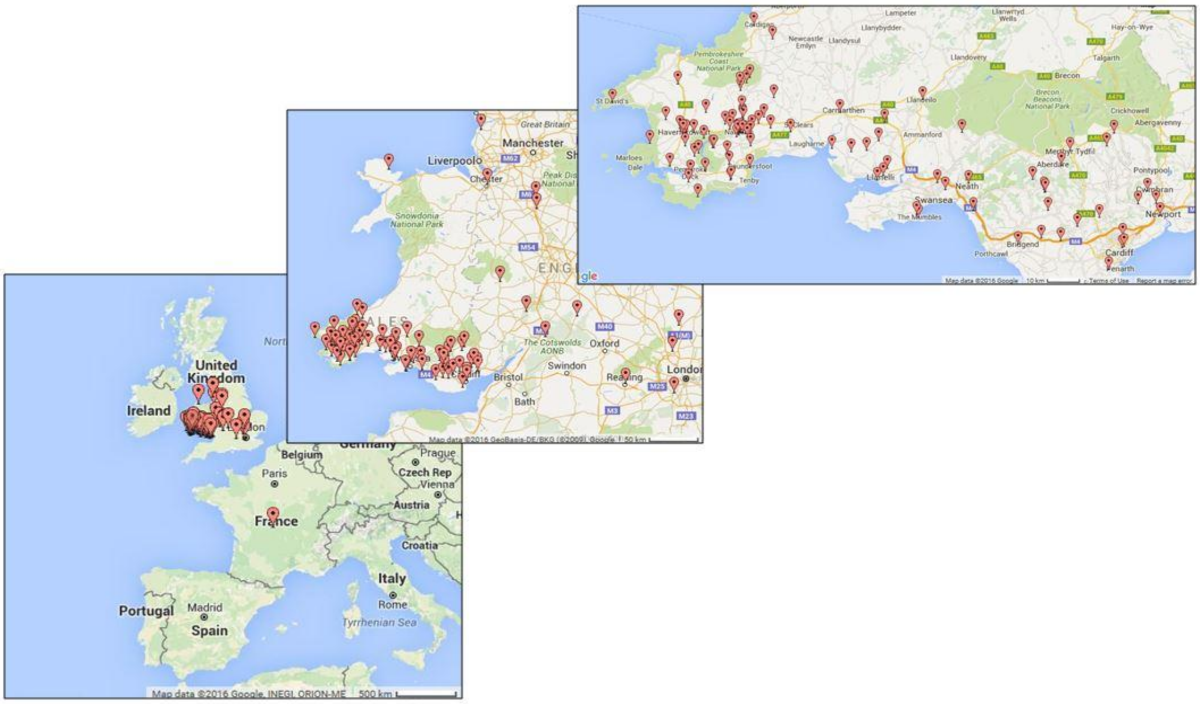
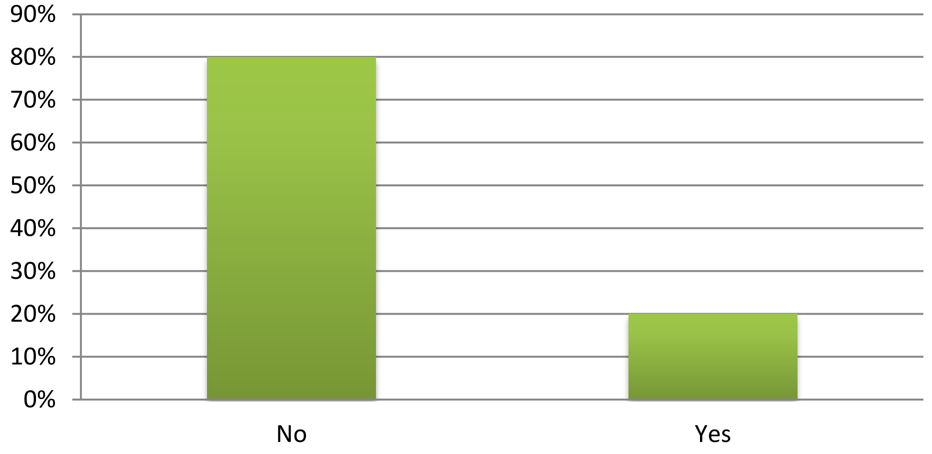


Figure A4.3 demonstrates that 20 per cent (30/150) of attendees were visiting a food festival in Wales for the first time. Those 120 who had been to another food festival in Wales were asked whether they had attended another food festival in Wales in the last 12 months — 41 per cent (49/120) said they had.

Figure A4.3: Is this the first time you have attended a food festival in Wales?

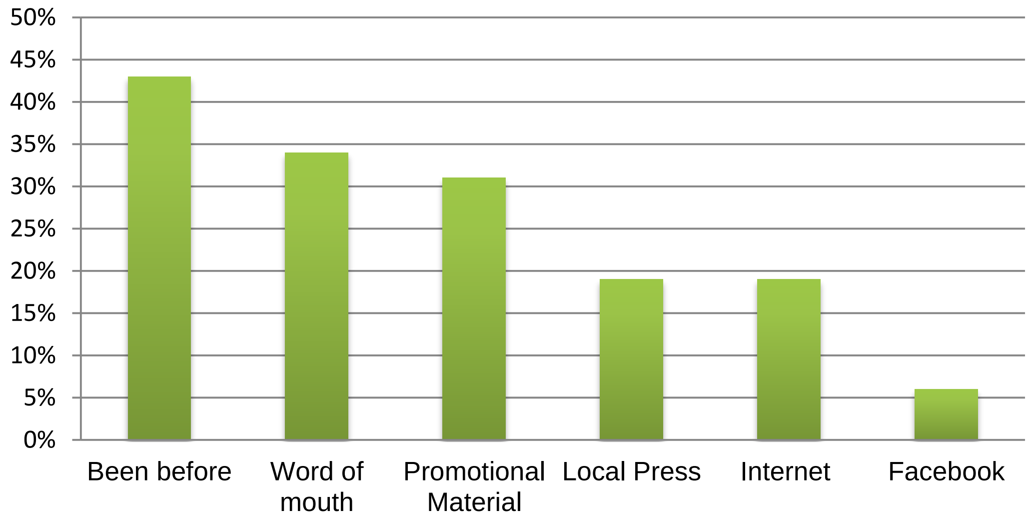


Base: n=150

Awareness and Attraction of the Food Festival

Visitors were asked how they became aware of Narberth Food Festival. Figure A4.4 highlights that 43 per cent (65/150) of respondents were aware of the food festival as they had been before. Thirty-four per cent (51/150) had heard about the festival through word-of-mouth, which suggests that the experience of previous attendees has an impact on attendance levels.

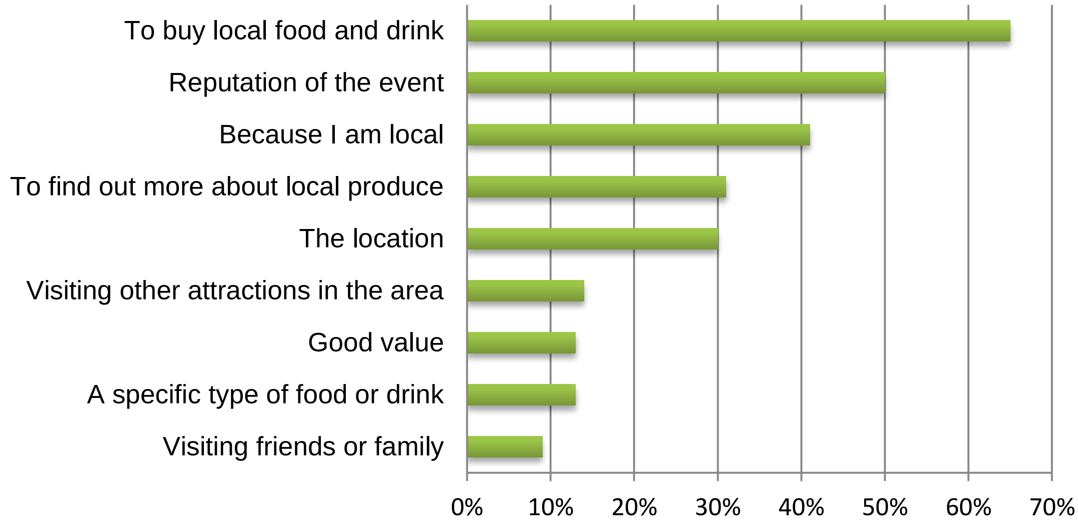
Figure A4.4: How did you hear about the festival?



Base: n=150. Note: the figure shows responses cited by a minimum of 5 per cent of respondents, and respondents could give more than one response.

To explore this further, respondents were then asked to specify the factors that most influenced their decision to come to Narberth Food Festival. Figure A4.5 shows the influential factors.

Figure A4.5: What factors most influenced you to come to the festival today?



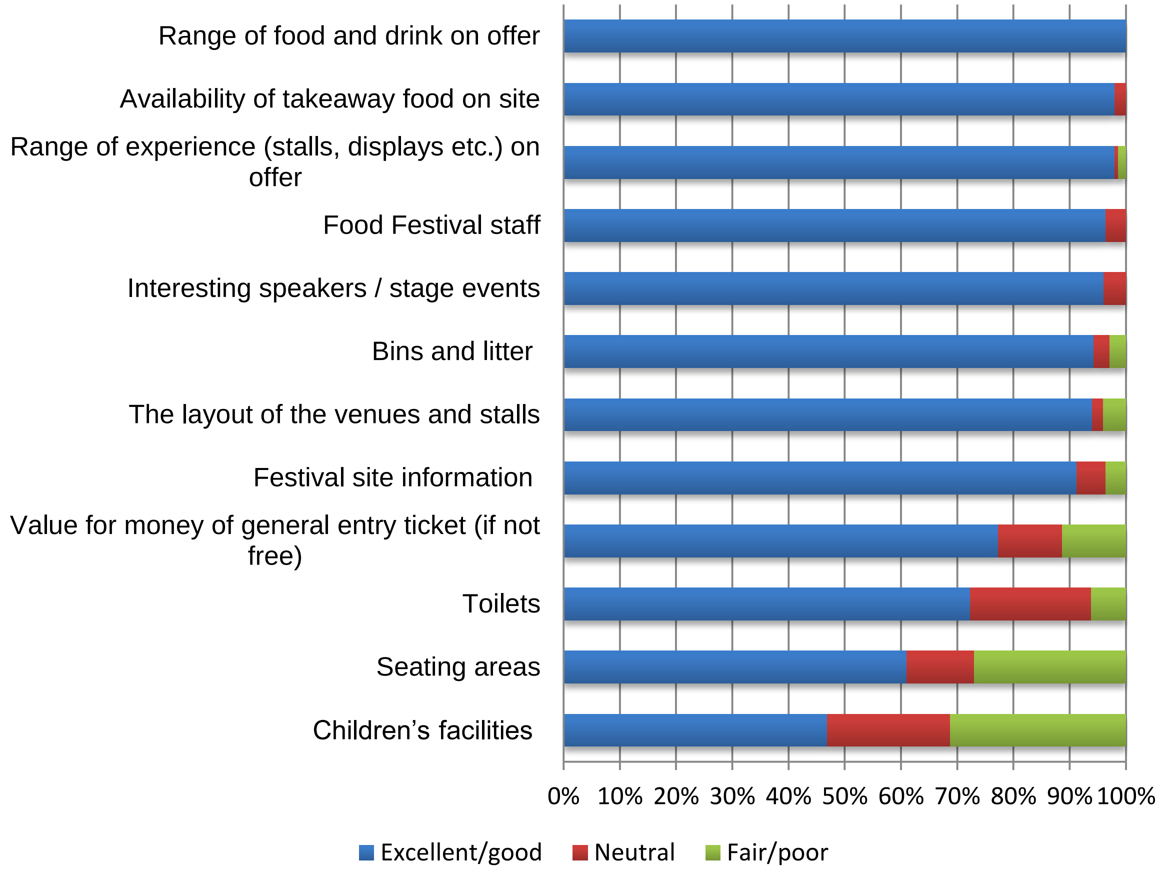
Base: n=150. Note: the figure shows responses cited by a minimum of 5 per cent of respondents, and respondents could give more than one response.

Festival Feedback

Respondents were asked to rate on a scale of one to four (one being *"not enjoying it at all"* and four being *"really enjoying it"*) how much they were enjoying the Narberth Food Festival. Eighty-nine per cent of respondents gave the festival a score of four out of four ('excellent'), and the remaining respondents rated the score three out of four ('good').

Respondents were asked to rate the Narberth Food Festival using a five-point scale (from excellent through to poor) against a series of criteria. Figure A4.6 illustrates the spread of responses against each criterion and highlights that, in most instances, the vast majority of respondents described the elements as either excellent or good.

Figure A4.6: How would you rate the festival in terms of the following?



Base: n = ranges from 32 to 150 (those who responded with "can't answer" were excluded from the analysis). It should be noted that "takeaway food" is not necessarily takeaway food in its traditional sense, but may be 'food to go' made from quality produce

Impact of the Food Festival

County residents were asked to rate on a scale of one to four (one being *"it did not influence my decision at all"* and four being *"it was the main influence on my decision"*) how much the festival influenced their decision to come to Narberth today, and results showed that 71 per cent (57/80) of county residents said that the festival was the main influence on their decision to visit Narberth today.

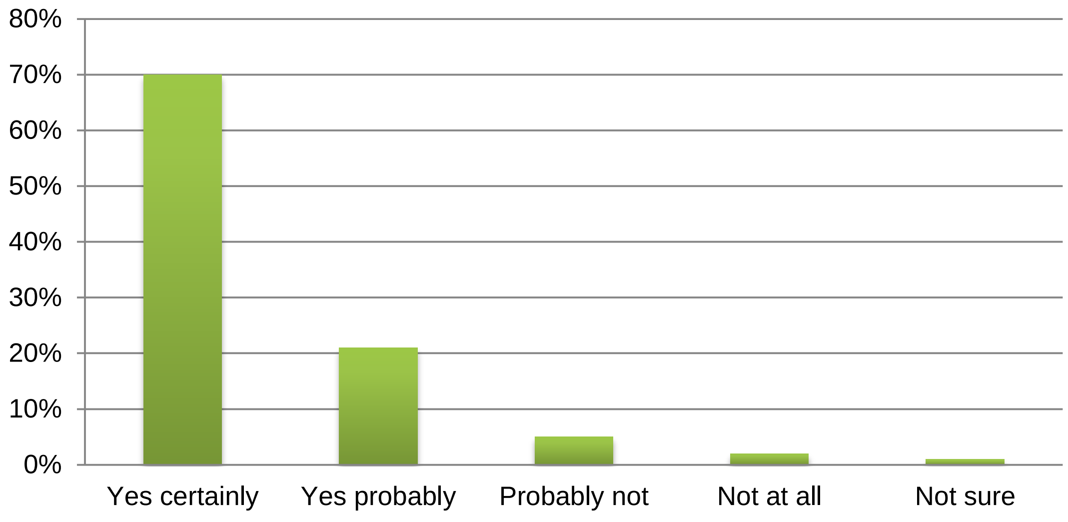
All visitors were asked how long they planned to stay at the food festival for. The highest proportion of visitors (71 per cent; 107/150) planned to stay at the festival for part of the day, with 20 per cent (31/150) saying that they planned to stay for the whole day. Forty-two per cent (63/150) of people planned to spend between £25 and £50, with a further 19 per cent (29/150) saying that they planned to spend over £50.

Respondents were asked how much they expected to spend in the local area, not including the food festival. Although 25 per cent (37/150) said that they would be spending nothing outside of the festival, 23 per cent said that they expected to spend between £10 and £20, and a further 22 per cent expected to spend between £20 and £50.

Attitudes of Narberth Food Festival Visitors

Surveyed attendees at the food festival were asked if their visit to the food festival had increased their awareness of local food and produce. Ninety-one per cent of respondents felt that it had (with 70 per cent (105/150) replying with "yes, certainly" and a further 21 per cent (32/15) replying with "yes, probably").

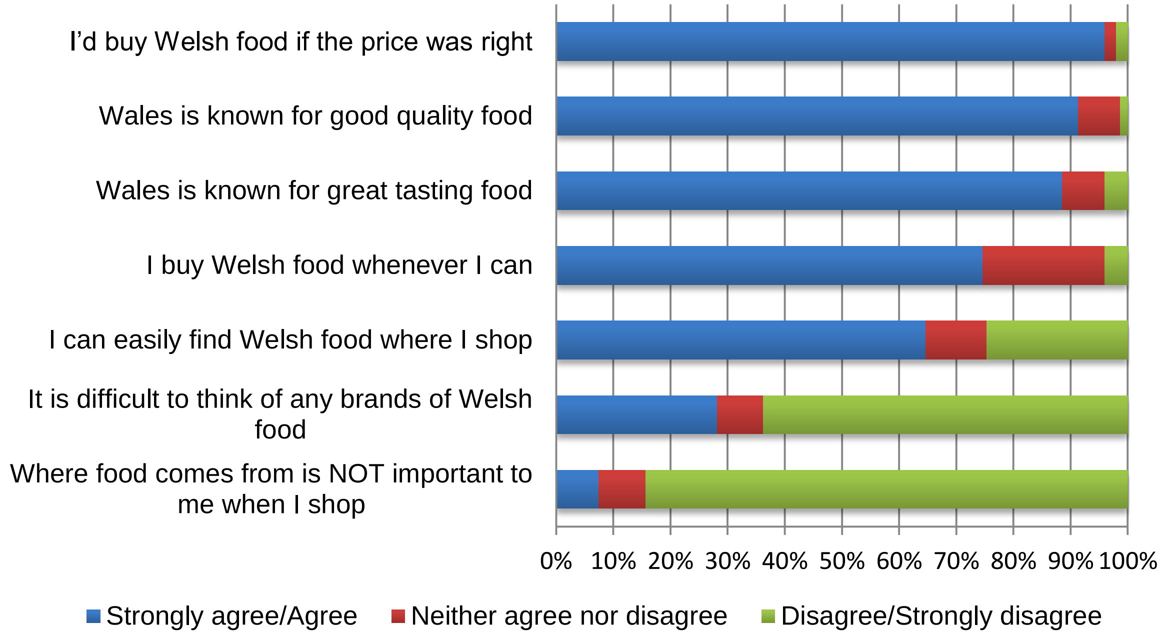
Figure A4.7: Has attending the food festival increased your awareness of local food and produce?



Base: n=150

Respondents were then asked the extent to which they agreed with a series of statements about Welsh food, and these results are shown in Figure A4.8.

Figure A4.8: To what extent do you agree with the following statements?



Base: n = ranges from 147 to 150

To conclude, respondents were asked if they had any final comments. Typical responses given can be seen below:

"Events like this are wonderful to promote local food."

"Fantastic day out. Very friendly and well organised."

"Good family friendly site. Hope it carries on when Sainsbury's take over site."

"It's a great day out and it's interesting to see the food and talks, etc."

"It's absolutely fantastic. Brings massive influx of people to Narberth."

"It's fantastic and good for the community - raises awareness of local produce. Should have one in the winter / Christmas too."

"More for children. Unbelievable food. Great for Narberth."

"More seating please and cheaper at the gate! We would buy more then."

"Represents the best of Welsh food in a proactive way. Feel good factor is here."

"The park and ride is good."

Newport Food Festival

Introduction

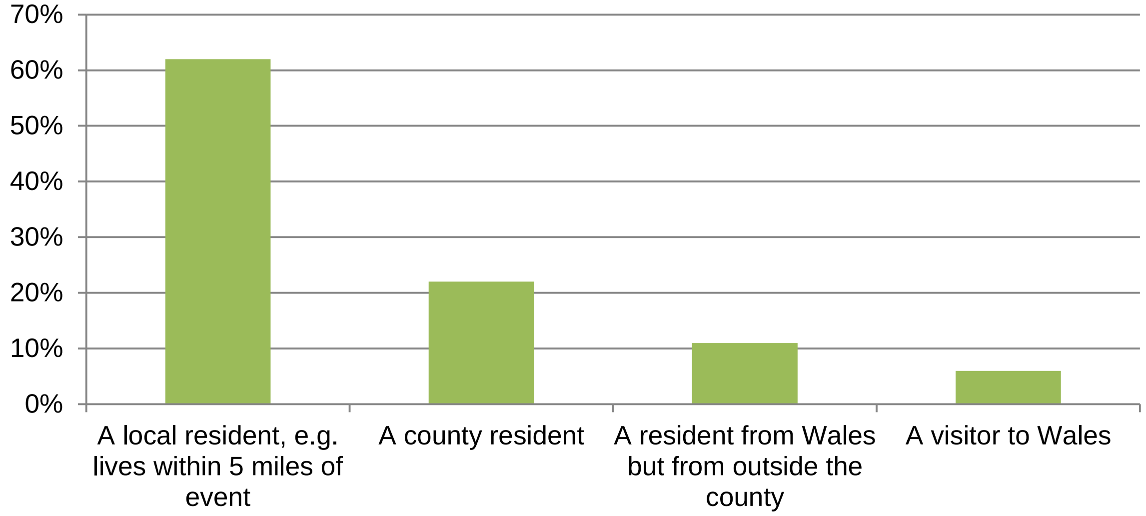
Wavehill were able to speak to 151 visitors at the 2015 Newport Food Festival. This report evaluates the visitor responses and examines the findings in further detail. Please refer to evidence within the main report for comparison with the average response from visitors across the surveyed food festivals.

The 2015 Newport festival took place on the 3rd of October and the weather was overcast. Out of the 151 visitors, 65 per cent (98/151) were male and 35 per cent (53/151) were female. The majority (69 per cent; 104/151) of people we spoke to were in employment, with a further 9 per cent self-employed. Eleven per cent (17/151) were retired. Other visitors we spoke to were students (6), unemployed (7), and unpaid family workers (4).

Attendee Profiles

Survey respondents were asked whether they were a local or county resident or a visitor to the area. Overall, most of those surveyed were local to the festival (within five miles).

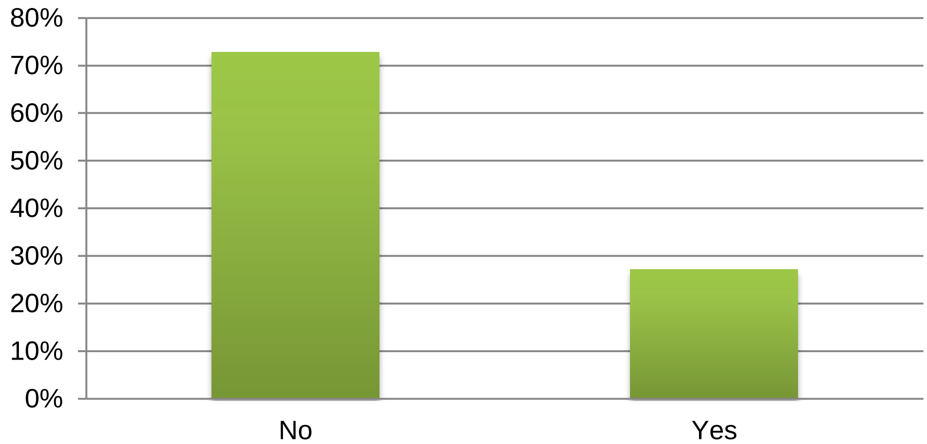
Figure A5.1: The proportion of visitors who are a local resident, county resident or visitor



Base: n=151

Attendees were then asked if it was the first time that they had attended a food festival in Wales. Figure A5.2 shows that, overall, 27 per cent (41/151) of visitors to Newport Food Festival had attended a food festival in Wales on a previous occasion.

Figure A5.2: Is this the first time you have attended a food festival in Wales?

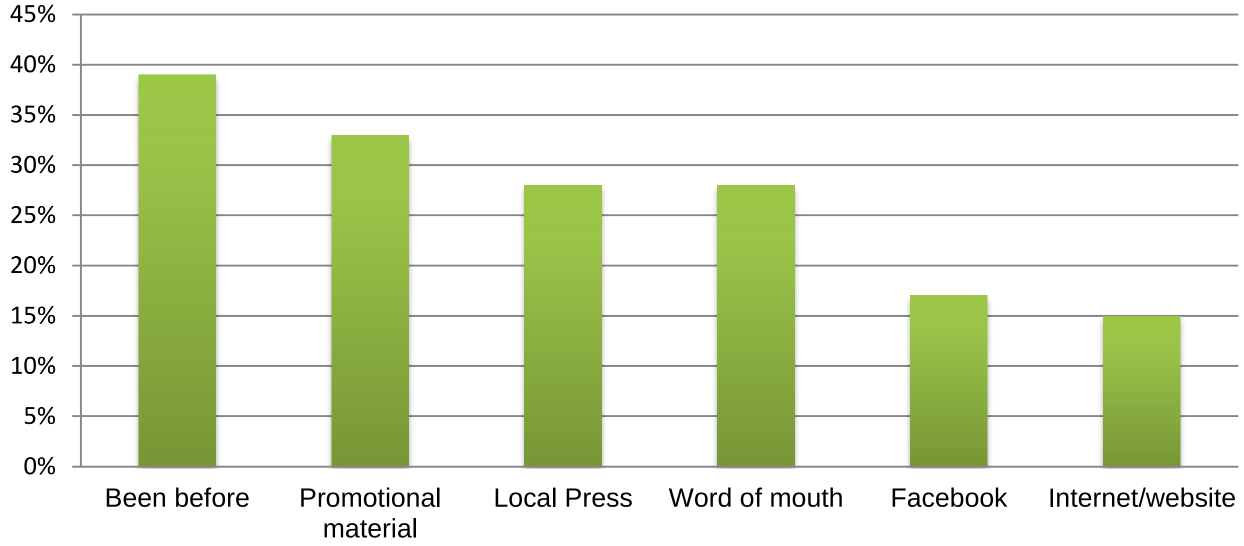


Base: n=151

Awareness and Attraction of the Food Festival

Visitors were asked how they became aware of Newport Food Festival. Figure A5.3 highlights that 39 per cent (59/151) of respondents had previously attended the festival.

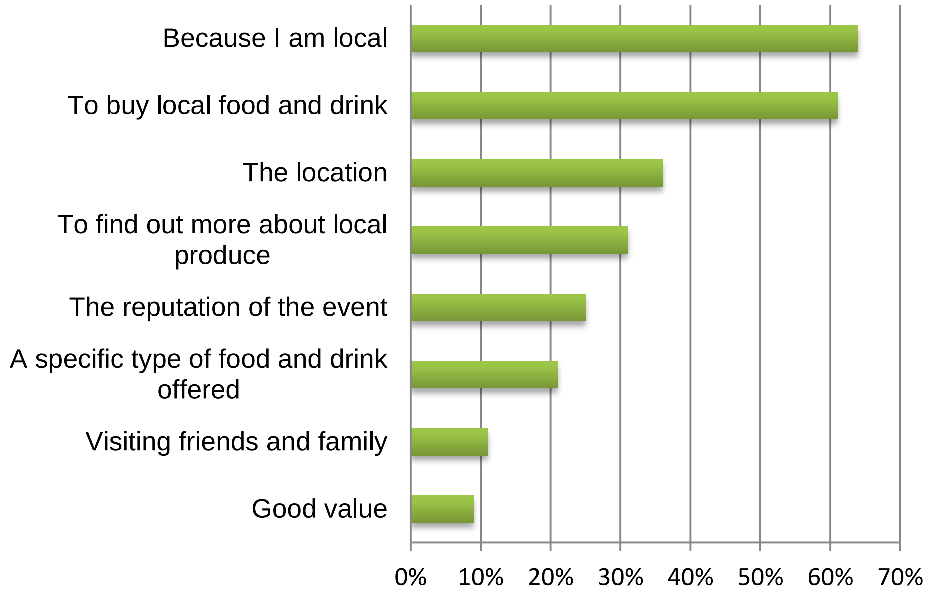
Figure A5.3: How did you hear about the festival?



Base: n=151

To explore this further, respondents were then asked to stipulate the factors that most influenced their decision to come to Newport Food Festival. Figure A5.4 shows the influential factors.

Figure A5.4: What factors most influenced you to come to the festival today?



Base: n=151. Note: the percentages total over 100 per cent, as respondents could give more than one answer.

Festival Feedback

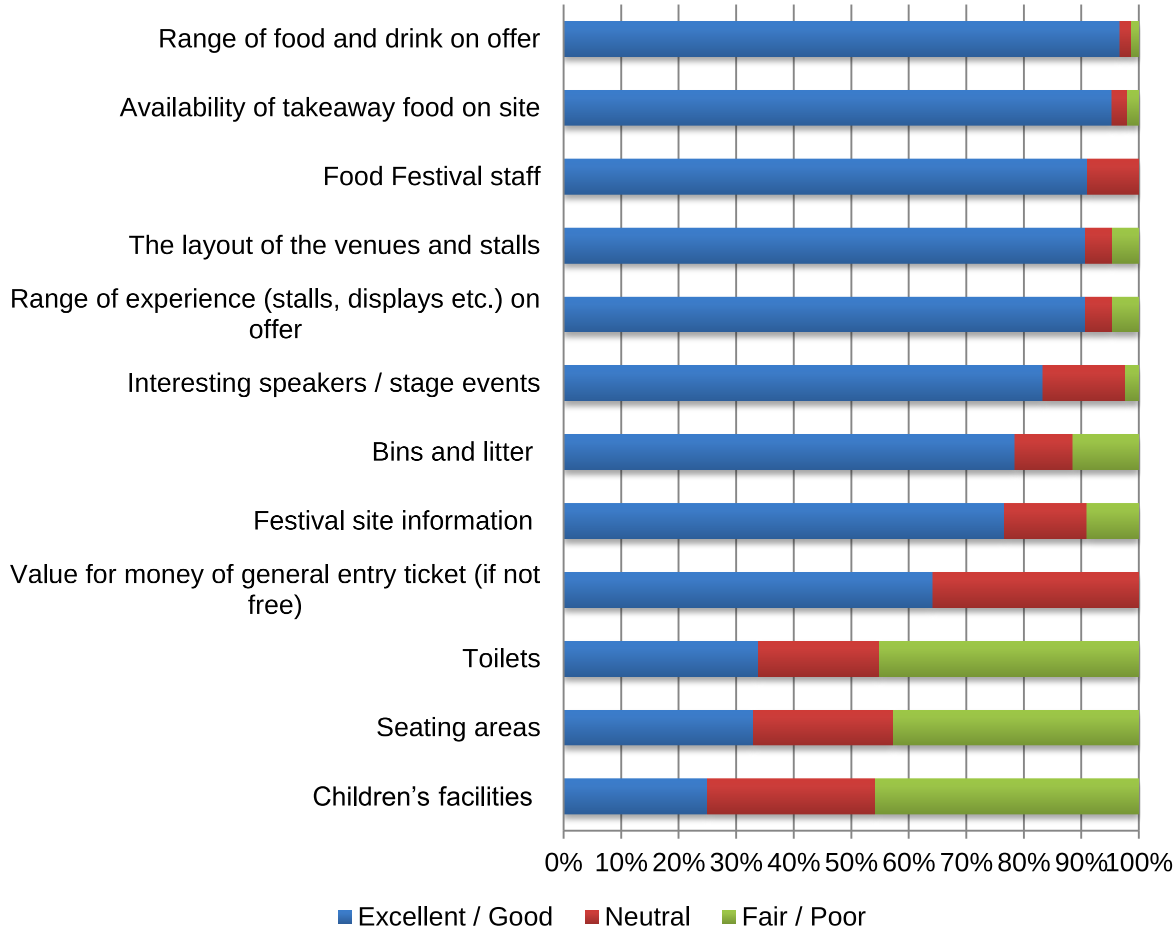
Respondents were asked to rate on a scale of one to four (one being *"not enjoying it at all"* and four being *"really enjoying it"*) how much they were enjoying Newport Food Festival. Seventy per cent (104/148[14]) of respondents said that they were really enjoying it, and a further 30 per cent (44/148) said that they were enjoying it a lot.

Respondents were then asked to rate the festival (from excellent to poor) against a series of criteria.

Figure A5.5 below maps the spread of responses against each criterion and highlights that for most criteria the vast majority of respondents described the elements as either excellent or good.

[14] Three respondents could not give a score.

Figure A5.5: How would you rate the festival in terms of the following?



Base: n = ranges from 24 to 151 (those who responded with "can't answer" were excluded from the analysis)

Impact of the Food Festival

County residents were asked to rate on a scale of one to four (one being *"it did not influence my decision at all"* and four being *"it was the main influence on my decision"*) how much the festival influenced their decision to come to Newport today, and results showed that the festival was the main influence for all county visitors.

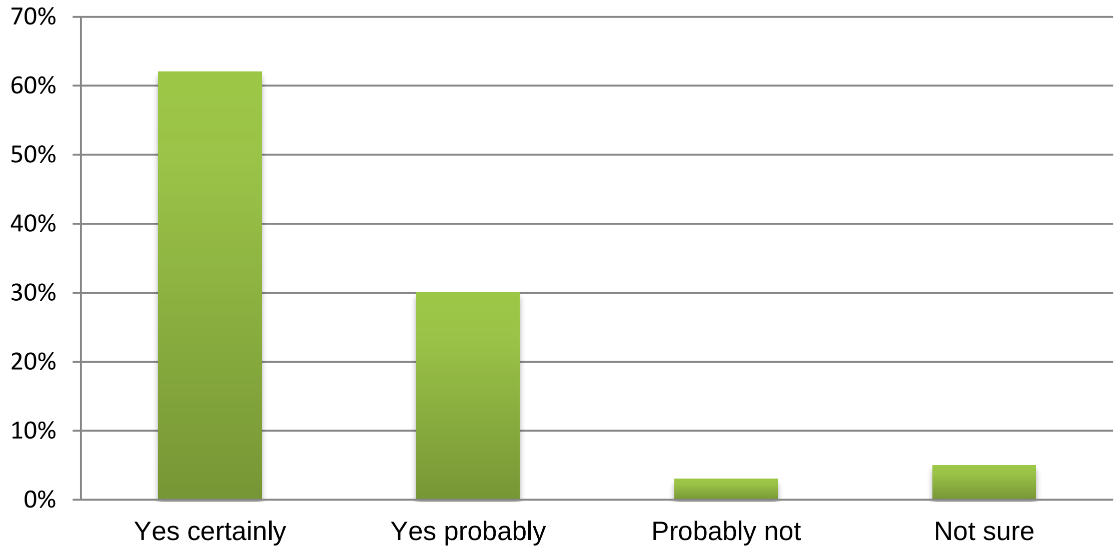
Eighty-seven per cent of visitors planned to stay at the festival for part of the day, with a further 12 per cent (18/151) saying that they planned to stay for the whole day. The highest proportion of visitors (44 per cent; 66/151) expected to spend between £10 and £25 at the festival.

Respondents were asked how much they expected to spend in the local area, not including the food festival. Although 32 per cent (48/151) said that they would be spending nothing, the other visitors thought that they would spend locally, ranging from under £10 (23 per cent; 36/151) to over £50 (7 per cent; 11/151).

Attitudes of Newport Food Festival Visitors

Surveyed attendees at the food festival were asked if attending Welsh food festivals increased their awareness of local food and produce. Sixty-two per cent (93/151) of respondents said that they were certain that their attendance at the food festival had increased their awareness of local food and produce, with a further 45 per cent (45/151) saying that it had probably increased their awareness.

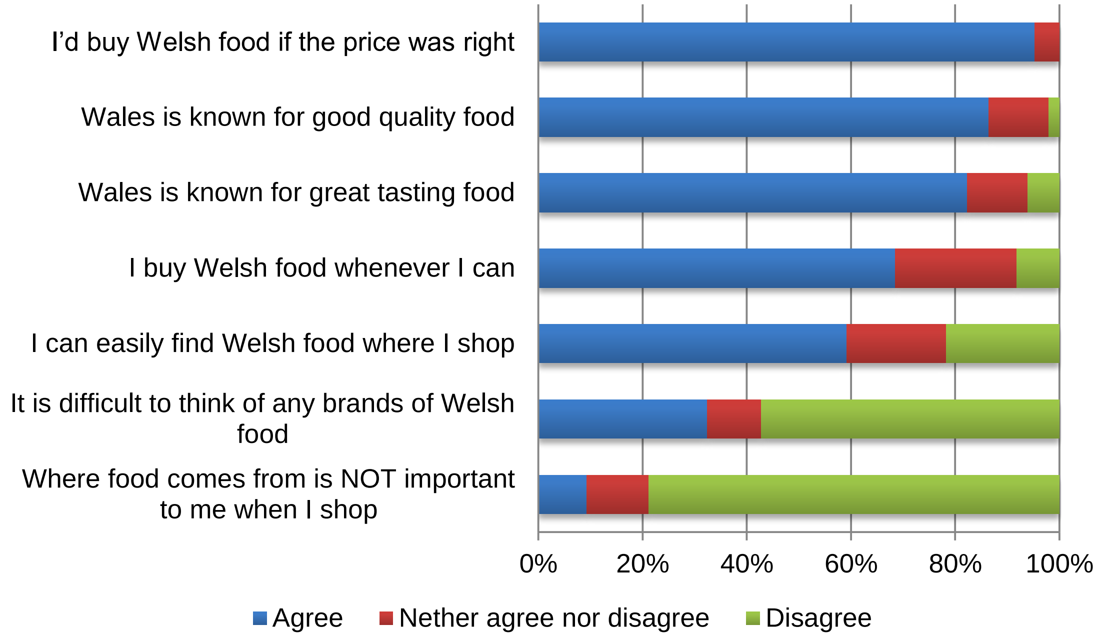
Figure A5.6: Has attending the food festival increased your awareness of local food and produce?



Base: n=151

Respondents were then asked the extent to which they agreed with a series of statements about Welsh food, and these results are shown in Figure A5.7.

Figure A5.7: To what extent do you agree with the following statements?



Base: n = ranges from 145 to 151

To conclude, respondents were asked if they had any final comments. Typical responses given can be seen below:

"Could be more variety - fresh produce rather than pre-cooked stuff."

"Good day out. Brings people in to Newport."

"I think it's really good. I'm impressed by the range and size."

"If the food is good and we prefer local food, then it's important where we shop from."

"It feels smaller than last year. It's good for the town to have it in the centre."

"It should be more often - more than once a year - the city comes to life."

"It would be good to see more street food - hog roasts and pop up restaurants."

"It's been excellent so far. The number and variety of stalls, the quality of demonstrations, they had TVs up which was good and had someone commentating which was excellent. Good promotion of Welsh produce."

“It's good to have it here, especially with the new development. More stalls than last time. When the development is finished maybe we should have a winter festival.”

“It's great. Nice to see it grow year by year. Maybe have one at Christmas as it’s good for local economy.”

“It's very interesting. A lot of people are attending.”

“Newport is busy today so the festival must be good for the town.”

“There could be a bit more for the children.”

“Well presented, good thoroughfare. Not enough toilet facilities to cope.”

St Fagans Food Festival

Introduction

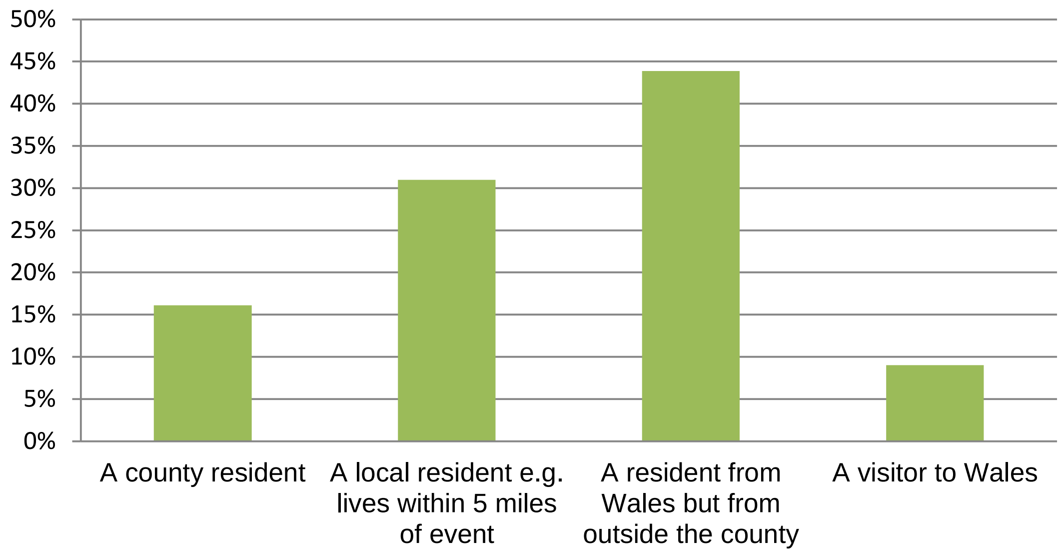
Wavehill were able to speak to 155 visitors at the 2015 St Fagans Food Festival. This report evaluates the visitor responses and examines the findings in further detail. Please refer to evidence within the main report for comparison with the average response from visitors across the surveyed food festivals.

The 2015 St Fagans festival took place on the first weekend in September and the weather was sunny and overcast. Out of the 155 visitors, 41 per cent (63/155) were male and 59 per cent (92/155) were female. Sixty-three per cent (97/155) of festival visitors we spoke to were employed, 19 per cent (30/155) were retired, 7 per cent (11/155) were self-employed, 5 per cent (8/155) were students, three were unpaid family workers, and six were unemployed.

Attendee Profiles

Survey respondents were asked whether they were a local or county resident or a visitor to the area. Many of those surveyed were a resident from Wales but from outside the county (44 per cent; 68/155).

Figure A6.1: The proportion of visitors who are a local resident, county resident or visitor



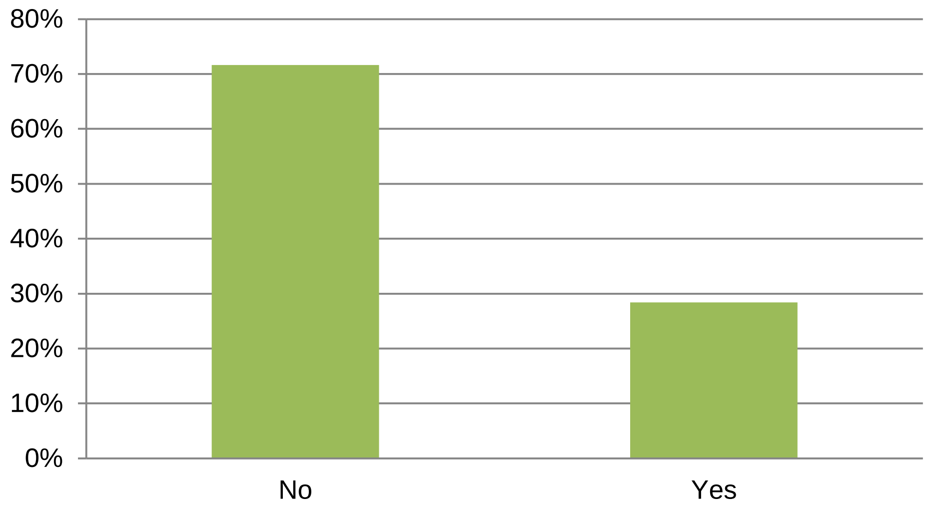
Base: n=155

The map below in Figure A6.2 plots the postcodes given by the visitors.

Figure A6.2: Map of plotted postcodes given by those interviewed

Attendees were then asked if it was the first time that they had attended a food festival in Wales. Figure A6.3 shows that, overall, 28 per cent (44/155) of visitors to St Fagans Food Festival had attended a food festival in Wales on a previous occasion.

Figure A6.3: Is this the first time you have attended a food festival in Wales?

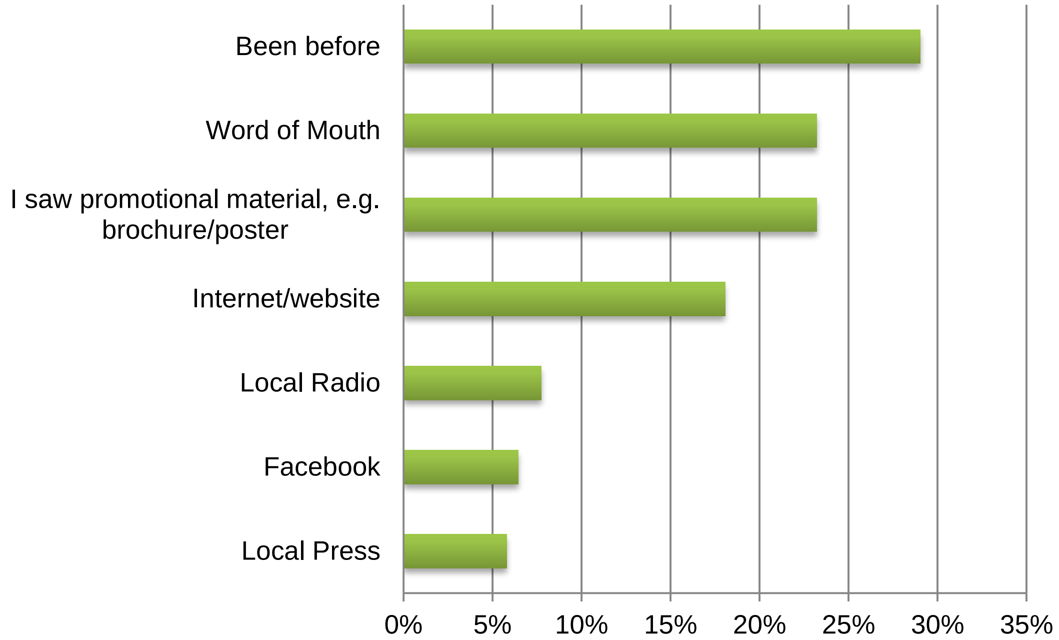


Base: n=155

Awareness and Attraction of the Food Festival

Visitors were asked how they became aware of St Fagans Food Festival. Figure A6.4 highlights that 29 per cent (44/152) of respondents had previously attended the festival.

Figure A6.4: How did you hear about the festival?



Base: n=155. Note: the percentages total over 100 per cent, as respondents could give more than one answer.

To explore this further, respondents were then asked to stipulate the factors that most influenced their decision to come to St Fagans Food Festival. Figure A6.5 shows the influential factors.

Figure A6.5: What factors most influenced you to come to the festival today?

Base: n=155. Note: the percentages total over 100 per cent, as respondents could give more than one answer.

Festival Feedback

Respondents were asked to rate on a scale of one to four (one being *"not enjoying it at all"* and four being *"really enjoying it"*) how much they were enjoying St Fagans Food Festival. Sixty-seven per cent (119/153[15]) of respondents said that they were really enjoying it, and 21 per cent said that they were enjoying it. Only two respondents gave a low score of one or two, and these were asked to explain their reasons for this score. They are listed below:

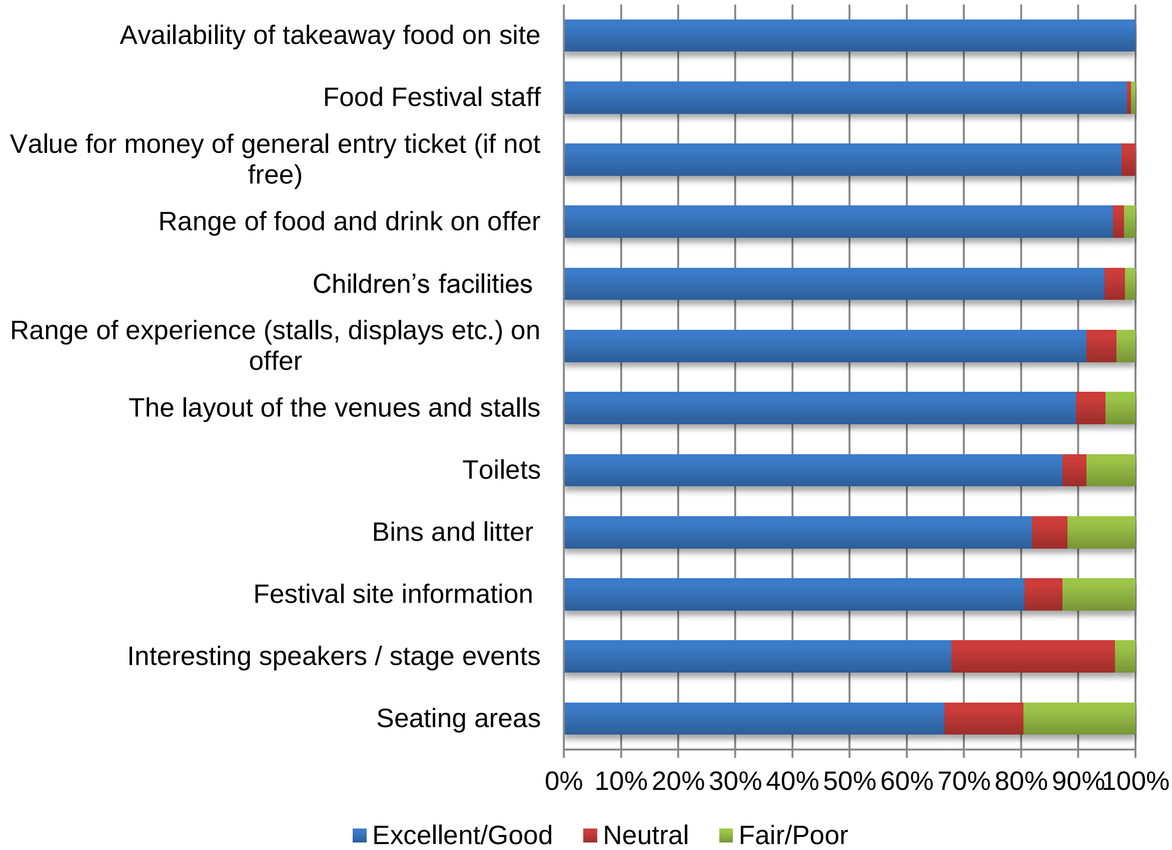
"Not as good as previous years. Stop baking fresh bread too early."
"Seems smaller than last year and the Scotch Egg Counter isn't here."

[15] Two respondents could not give a score.

Respondents were then asked to rate the festival (from excellent to poor) against a series of criteria.

Figure A6.6 below maps the spread of responses against each criterion and highlights that for most criteria the vast majority of respondents described the elements as either excellent or good. It should be noted that "takeaway food" is not necessarily takeaway food in its traditional sense, but may be 'food to go' made from quality produce.

Figure A6.6: How would you rate the festival in terms of the following?



Base: n = ranges from 41 to 155 (those who responded with "can't answer" were excluded from the analysis)

Impact of the Food Festival

County residents were asked to rate on a scale of one to four (one being *"it did not influence my decision at all"* and four being *"it was the main influence on my decision"*) how much the festival influenced their decision to come to St Fagans today, and results showed that 81 per cent (55/68) of county residents said that the festival was the main influence on their decision to visit St Fagans today.

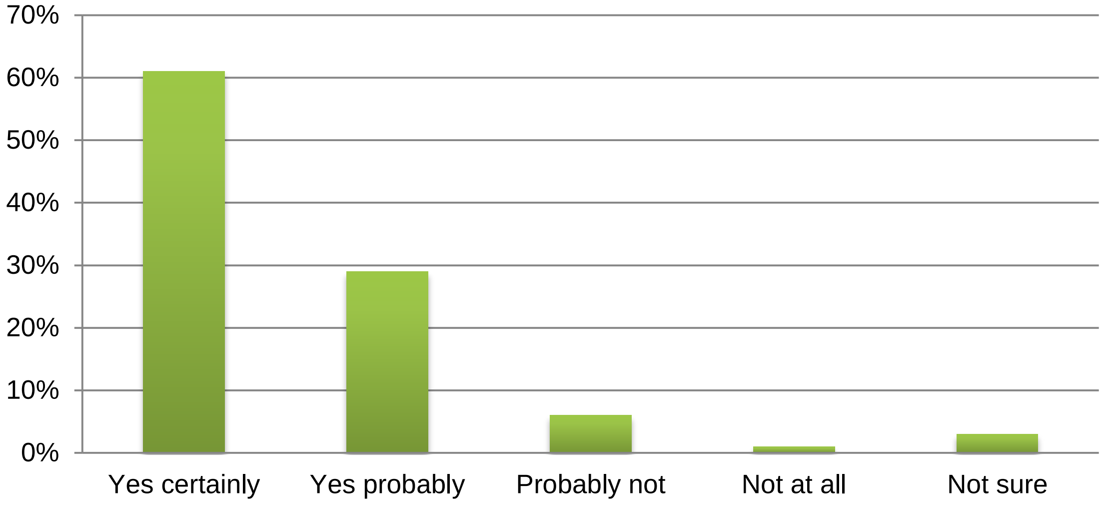
The highest proportion of visitors (79 per cent; 123/155) planned to stay at the festival for part of the day, with a further 19 per cent (30/155) saying that they planned to stay for the whole day. Thirty-five per cent (54/155) of people planned to spend between £10 and £25, and 38 per cent (59/155) said that they planned to spend from £35 to £50.

Sixty-nine per cent of respondents said that they did not expect to spend any additional money in the locality of the festival. Others said that they would spend between £10 and £250.

Attitudes of St Fagans Food Festival Visitors

Sixty-one per cent (94/155) of respondents said that they were certain that their attendance at the food festival had increased their awareness of local food and produce, with a further 29 per cent (45/155) saying that it had probably increased their awareness.

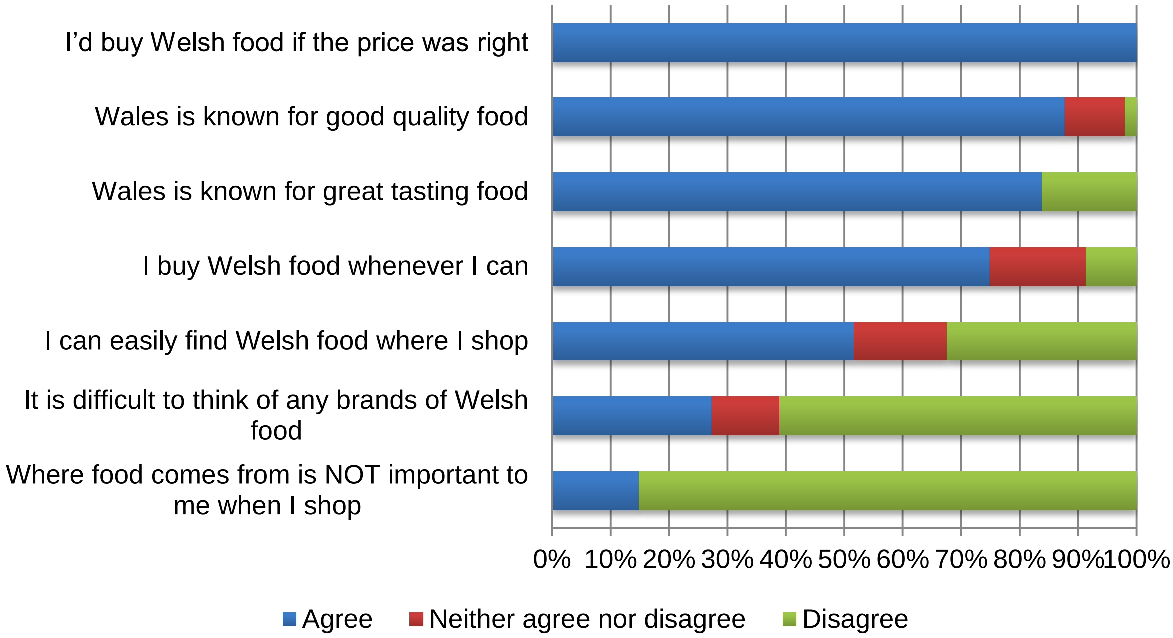
Figure A6.7: Has attending the food festival increased your awareness of local food and produce?



Base: n=155

Respondents were then asked the extent to which they agreed with a series of statements about Welsh food, and these results are shown in Figure A6.8. Respondents were, on the whole, positive about Welsh food, but they were less sure where they could buy or what Welsh brands existed.

Figure A6.8: To what extent do you agree with the following statements?



Base: n = ranges from 151 to 155

To conclude, respondents were asked if they had any final comments. Typical responses given can be seen below:

"I love how well laid out it is. I'm really impressed."

"I think there should be more toilets and more information on stall layouts."

"It's good to promote local produce."

"It's not as well known as it should be. Always well organised and laid out. Good day out."

"More seating areas with tables."

"More signage needed. Need more information about the site."

"No advertisement of the festival on the St Fagans website or that there would be a charge for parking. Also, it was difficult to park in the field for some people."

"Parking is the only problem today. Well laid out. Good day out."

"Slightly different every time. Caters for everyone. A lot more family orientated. More Welsh speakers."

"We expected more people, it's quieter than usual."

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