

Isle of Man Food & Drink Festival

2021

Exhibitor and Visitor Research Report

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# Executive summary

The Isle of Man Food & Drink Festival has been running for thirteen years and continues to go from strength to strength particularly in respect of qualitative aspects as well as its economic contribution and driver for local food and drink producers. It continues to be vital however to assess the feedback and value of the Festival amongst attendees and exhibitors in order to be able to make evidence based recommendations regarding future Festivals, including economic viability and location in particular. This report makes recommendations based on feedback gathered from 224 visitors to the festival and 28 exhibitors It should be seen in the context of a wider assessment of its value by DEFA, including a return on investment analysis for the 2021 Food & Drink Festival as a whole, incorporating such aspects as sponsorship, profile of exhibitors etc.

This year’s Festival was of course set in a very different context to last years in that the Island in 2020 was to experience no social restrictions due to COVID-19 and Islanders were free to attend and in fact were perhaps more keen than ever to attend due to the limitations on cross border travel from the Island and a keen interest in local events generally. The off-Island COVID-19 restrictions no doubt had an impact on the attendance of non-Island based visitors last year. This year’s Festival was more akin to historical events, although perhaps somewhat restricted from a visitor attendance point of view.

The profile of respondents continues to be very similar to that seen in previous years’ research - primarily local residents and over the age of 35, around half from the East of the Island and regular attendees at the Isle of Man Food & Drink Festival. Three quarters of visitors state they continue to see the Festival as an opportunity to buy local food to take home and to sample products - this continues to represent an important opportunity for exhibitors as well as gives a firm indication of the desire to purchase local foods in this type of experiential setting as well as perhaps wider outside the event.

It continues to be considered important that the Isle of Man Food label be displayed – it is recommended to maintain the profile and awareness of this and its importance to both consumer and producer audiences.

The festival was generally perceived as good value for money, a satisfying experience and as having good value local produce. When asked ‘Where did you hear about the festival?’, the majority of respondents indicated they knew about it anyway. The social media campaign appeared to be more effective this year and radio and local press continue to diminish in their awareness raising for the event. It is recommended that a fully integrated campaign be implemented in future, including signposting to the feedback questionnaire as it remains so vital to assessing the value and performance of the Festival and to support the associated evidence based strategic decision making on such aspects as customer experience.

The overall significance of the Festival and in its **economic contribution of £365,085** (compared with £432,080 in 2020 and £225,000 in 2019) remains high. This figure is based on DEFA reports of **8827** (this figure does not include children) **adult entrants with a reported average spend of £41.36** (very slightly higher than last years’ average spend) – it does not include any profit from gate entry paid which would presumably contribute further to the economic benefit of the event.

Exceptionally high levels of willingness were demonstrated through the research to attend future shows from the point of view of visitors and exhibitors. Minor areas for improvement are identified through the report with some specific minor recommendations.

Exhibitors’ objectives for attending the Festival are almost entirely met and they are generally satisfied with the levels of organisation before and during the Festival. The overall recommendation is that exhibitors continue to be involved well in advance of the show and that feedback is also given to help them see the value in giving feedback.

The additional questions put to both visitors and exhibitors this year relating to the suitability of the venue and potential alternatives to promote growth for the event highlight some differences in opinion between visitors an exhibitors – it is clear that an alternative is acceptable but that the overall preference for visitors is Douglas (exhibitors favour Knockaloe Farm much more than visitors). It is recommended that any change of venue is carefully considered and communicated and expectations for both groups of attendees are very carefully managed.

# Research

# Objectives

1. Gather quantitative and qualitative feedback on the Isle of Man Food & Drink Festival from both consumers and exhibitors
2. Ensure anonymity for exhibitor responses
3. Provide information to contribute to the assessment of the value of the food festival to the Island and to Government as facilitator
4. Maximise the response rate via online and hard copy questionnaires distributed at the festival
5. Incorporate the offer of a hamper to help incentivise the research
6. Keep research costs down to an absolute minimum

**Methodology**

Online surveys tailored to visitor and exhibitor audiences, promoted at the time of the Festival and closed around 3 weeks after the event for analysis.

# General Findings

* **Of the** **8827 adult visitors to the Food & Drink Festival 2021, 224 respondents took part in the 2021 visitor survey** (346 in 2020, 309 in 2019, 278 in 2018, 261 in 2017 and 213 respondents in 2016), via online and hard copy sources. The response rate was around 2.5% of the adult visitor population to the Isle of Man Food & Drink Festival 2021. Attendees for comparison purposes were: an estimated 16,000 in 2020, 7100 adults in 2019, 10,000 entrants in 2018, 8500 in 2017 and 10,000 in total in 2016. The response rate to the questionnaire is considered to be a valuable and valid set of responses. The number of recorded attendees being 8827 to the Festival was lower than the previous year when numbers entry numbers were around 16,000 (11,000 adults and 5,000 children) – the Isle of Man had of course had restricted travels for borders and attracted a higher than expected number of visitors to any local events generally
* **Key sponsors** for the 2021 Festival were PokerStars, Gamesys, Zurich, Trade Distribution, Magnet, IOM Meats, Time Enough and in association with Manx Radio
* New this year was the sustainability corner with The AB Project, Western Civic Amenity site, Manx Utilities, Zero Waste Mann and UNESCO Biosphere
* Shuttle bus usage to and from the Grandstand was limited at around 50 using to go to the Festival and around 40 departing the festival
* The off-Island COVID-19 restrictions no doubt had an impact on the attendance of non-Island based visitors at the 2020 event whereas **off island visitors were again seen at the 2021 Festival**. Entry fees were substantially reduced to £2.50 per adult for the 2020 event and were raised again to £5 per adult for the 2021 event.
* **28 exhibitors took part in their version of the survey again this year**, via online survey, which was just slightly less than those who responded having exhibited last year (33). This is considered to be a representative sample given the number of exhibitors taking part in the festival. **The feedback remains positive from the exhibitors** in respect of the value of the Festival to their businesses.
* It is pleasing to see that there is generally **great consistency in feedback amongst the findings of this years’ survey compared with previous years** of data and that the overall significance of the Festival and in its **economic contribution of £365,085** (compared with £432,080 in 2020 and £225,000 in 2019) remains high. This figure is based on DEFA reports of **8827 adult entrants with a reported average spend of £41.36** (very slightly higher than last years’ average spend) – it does not include any profit from gate entry paid.
* Gate entry flow very roughly followed a similar pattern to last year with the **majority of entrants arriving between 12.00 and 16.00** on both days – interestingly the gate entry data shows around **two thirds of people visited on the Saturday and around one third on the Sunday** – this was somewhat different to last year where the numbers appeared to be more balanced between the two days

# Key Findings – Visitor Survey

* The profile of respondents was mainly local (93%) with levels of visitors not quite back to pre-2020 levels of around 10%. the vast majority remain over the age of 35 (85%) with the highest proportion (44%) coming from the East of the Island and the remainder being split roughly equally between the other three regions. This is reasonably consistent with the profile of respondents from the previous years’ research (apart from 2020 when 57% respondents were from the East) .The number of respondents in the 18 – 35 age category accounted for just 13% respondents (lower than the previous years in percentage terms
* ­The respondents continue to appear to be committed fans of the Isle of Man Food & Drink Festival, with a significant 71.5 (72% in 2020, 60% in 2019, 66% in 2018, 63% in 2016 & 2017 and 54% in 2015) mentioning they *regularly attend* and 22% attending *s­ometimes*. Their pattern of attendance at the Royal Manx is much less (37% regularly, 38% sometimes) and at the Southern Agricultural show somewhat less (26% regularly, 44% sometimes). The trends in responses to this answer over the last years of data indicate a continued and consistent loyalty/preference to attending the Food & Drink Festival amongst this audience. It should be noted that the Royal Manx and Southern Agricultural Shows had gone ahead this year but that the loyalty to these shows amongst the Food & Drink Festival attendees appears to be reducing with visitors indicating more of an occasional visit to the shows rather than regular attendance.
* There is continued consistency with the top four reasons for attraction to the festival, with the majority of the visitors to the Food & Drink Festival stating that they visit the festival as it is an opportunity to buy local food to take home, to sample local products, to see what is available locally and generally a nice day out. This year’s feedback suggests that ‘opportunity to sample’ was more significant for attendees which is entirely consistent with previous years
* The historical key reasons for attending the show are as follows:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2021** | **2020** | **2019** | **2018** | **2017** | **2016** | **2015** | **2014** |  |
| An opportunity to sample local food, drinks and craft (82%) | An opportunity to sample local food, drinks and craft (84%) | An opportunity to sample local food, drinks and craft (83%) | An opportunity to sample local food, drinks and craft (91%) | An opportunity to sample local food, drinks and craft (83%) | An opportunity to sample local food, drinks and craft (88%) | An opportunity to sample local food, drinks and craft | An opportunity to see what is available locally | **1** |
| An opportunity to see what is available locally (78%) | Generally a nice day out (83%) | An opportunity to buy local food to take home (77%) | An opportunity to buy local food to take home (84%) | An opportunity to see what is available locally (82%) | An opportunity to see what is available locally (79%) | An opportunity to see what is available locally | An opportunity to sample local food, drinks and craft | **2** |
| Generally a nice day out (77%) | An opportunity to see what is available locally (81%) | An opportunity to see what is available locally (77%) | An opportunity to see what is available locally (82%) | An opportunity to buy local food to take home (82%) | An opportunity to buy local food to take home (74%) | Generally a nice day out | An opportunity to buy local food to take home | **3** |
| An opportunity to buy local food to take home (76%) | An opportunity to buy local food to take home (80%) | Generally a nice day out (67%) | Generally a nice day out (74%) | Generally a nice day out (77%) | Generally a nice day out (72%) | An opportunity to buy local food to take home | Generally a nice day out | **4** |

* The festival continues to be generally perceived as:
* good value for money
* a satisfying experience
* having good value and quality local produce which also has good availability outside the show
* increasing the likelihood to purchase since attending the show
* appealing to attend again
* enjoyment of celebrity chefs (65%)
* needing cookery demonstrations - around 55% of people say they also enjoy seeing these which is slightly lower than previous years
* a supplementary pair of statements were added to the 2017 questionnaire to ascertain familiarity with and need for the provenance label. In 2017 81% respondents said that they were aware of the Isle of Man Food Provenance Label and 89% felt it is important for the Island’s products to display the Food Provenance Label. The figures for these two questions in the 2018 research were somewhat lower mainly for awareness, with 69% of respondents being aware of the label but 83% feeling it important that the label be displayed. 73% indicated awareness of the label in 2019 with 83% feeling it important to be displayed. For 2020, the awareness was 74% and importance to display was 87%. For 2021, the responses indicate 69% awareness and 73% feeling it important to display
* When asked ‘Where did you hear about the festival?’, 65% respondents indicated this year they knew about it anyway (63% in 2020, 58% in 2019, 65% in 2018, 63% in 2017 and with 54% in 2016) . The numbers being made aware via Social media have grown slightly further at 42% (40% in 2020 and 31% in 2019). Awareness created through the local press continues to diminish, with just 18% respondents indicating this was where they hear about the Festival (c28% in 2020). Just 7% claimed to have heard about the festival via radio which appears to be reducing compared with the last 3-4 years (10% in 2020). These responses give a clear indication for the need for integrated future promotional campaigns around the event using a variety of fully integrated media.
* The average number of adults in the group was stated as 2.7 again which is the same as 2020 (compared with 2.7 in 2019, 2.0 in 2018 and 2.2 in 2017) and the average spend per person was reported to be **£41.36** at this year’s (compared with £39.28 in 2020, £41 in 2019, £42 in 2018 and £34 in 2017) Festival. This figure remains roughly consistent with last 2 years data. It should be noted that the question remains unaltered for this year’s questionnaire (In 2015 the question was: *rough amount of money spent by you/your group (excluding entrance fee)* and in 2016 the question was changed to: *rough amount spent by you or per person in your group (excluding entrance fee)* Respondents indicated an average spend of £44 in 2015 whereas this figure was reported at £27 in 2016.)
* To use this year’s figure for estimating the economic impact of the 2021 event, we are taking the estimated adult entrants as 8827. **This would suggest an economic value of £365,085 (compared with £432,080 in 2020, £225,000 for 2019, £298,000 in 2018 and £230,000 in 2017**) which is of significant value to the economy when compared with previous years’ calculations even with the excessively high visitor numbers of 2020) and a significant factor when taking into account the multiplier effects of that spend in the Isle of Man economy.
* An additional supplementary question was introduced in 2017 about how many businesses respondents bought from that day and the 2021 data shows people bought from an average of 4 businesses which is entirely consistent with previous years’ responses. Considering the number of exhibitors, this figure perhaps shows room for improvement
* Respondents were asked if there was anything in particular they liked about the food festival. The most common mentions were very similar to previous years and included:
  + Food /produce
  + Atmosphere
  + Friendly
  + Range of produce
* Respondents were asked if there was anything in particular they disliked about the food festival. The most common mentions were also very similar to previous years and included:
  + Queues
  + ‘Nothing’ – indicating a very positive experience
  + Lack of stalls (?) and lack of diversity of food stalls (lack of veggie? No seafood?)
  + lack of seating/layout
  + wasps
  + pricey
* An additional question was introduced this year relating to venue - To facilitate its future growth and development, would you attend the Isle of Man Food & Drink Festival at an alternative location? Tick all that apply:

|  |  |
| --- | --- |
| Yes, anywhere on Island | 55.7% |
| No, the event should remain at the Villa Marina | 33.9% |
| Nobles Park, Douglas | 18.6% |
| Knockaloe Farm, near Peel | 6.8% |
| Other (please specify) | 8.6% |

Additional comments were noted as:

|  |
| --- |
| would attend wherever its held but like villa marina |
| tynwald hill/ st johns cricket field |
| Ramsey |
| N/A Not likely to come to IOM again |
| Cathedral Grounds Peel |
| Douglas based suits me better, personally |
| Silverdale Glen, Rushen Abbey, Great Meadow, Mill Tow, Polsun Park |
| I think its a good location, people without transport can get to it easy enough, it was a bonus seeing the visiting classic cars enroute to it on the prom. |
| Anywhere on the Island except the North (too far for a casual visit) |
| Like the Villa as central |
| Any farm so people can see where it comes from ? |
| It's convenient being in Douglas |
| Nunnery |
| Nunnery is much nicer and central too, probably would t drive to it. |
| Ramsey |
| Anywhere easily accessible |
| You could expand into the Villa itself and the arcade |
| The Nunnery |

* 199 people entered an email address to be entered into the prize draw for the hamper – this represents a consistently high percentage again this year and suggests this is an excellent way of attracting attention and was probably a key contributing factor for giving feedback.

# Key Findings – Exhibitor Survey

As with previous years, the majority of exhibitor respondents were **small** food, craft and other producers, three quarters of whom don’t export at all and 25% of whom export some. This may or may not be actually representative of the profile of exhibitors who attended the show – this can be cross checked with DEFA exhibitor information.

Approximately half are regular exhibitors at the Food and Drink Festival, with very few also being exhibitors at the Agricultural Shows. The pattern of regularity of exhibiting at the Food & Drink Festival had been growing year on year indicating that the event is offering value to the exhibitors. However in 2021 there is a larger group (9 exhibitors) who indicated that they had never exhibited at the Festival before – again this can be checked against DEFA data to confirm whether there were indeed around 30% new exhibitors this time. It may be that a disproportionate number of new exhibitors felt the need to respond to the feedback questionnaire.

The main reasons stated for exhibiting at the show continue to be to raise awareness and to sell products/services as well as to make additional contacts and generate enquiries which is entirely consistent with previous years.

**82% of respondents** **plan to exhibit at the Isle of Man Food & Drink Festival in the future** (compared with **97% in 2020)** indicating a continued high level of satisfaction with the event. Last year 80% /70% planned to exhibit at the Royal Manx and Southern & District Agricultural Shows in the future, however this year, only around one third of respondents indicated their likelihood of exhibiting at the Shows.

The **majority of exhibitors were very satisfied with the majority of the aspects of arrangements *prior* to the event** taking place, with just 3 mentions of the venue, information from DEFA and promotion of the event as being a source of dissatisfaction. The venue facilities, Festival facilities and pre-show booking had overall lower levels of satisfaction than other aspects.

***During*** the Festival, **most exhibitors were broadly satisfied with the majority of arrangements** albeit to a slightly less extent than with pre-festival arrangements. Some exhibitors highlighted this year areas of dissatisfaction as positioning of stand space (4), quality of ground space (2) and general organisation (1). It may be that there is room for improvement for facilities for exhibitors as the majority indicated ‘satisfied’ (64%) only as opposed to ‘highly satisfied’ (29%).

All exhibitors responded that they were **satisfied with the outcome of having exhibited** **at the show in terms of meeting their objectives**, but a some respondents indicated they were dissatisfied (or marked ‘N/A’) for the follow up from DEFA for the festival, for value for money and for value of business resulting from the Festival. This is a consistent level of response to the question from previous years but it remains relatively high in terms of numbers of exhibitors marking the follow up activities from DEFA as being N/A (43% in 2021 and 27% in 2020).

An additional question was introduced in 2018: ***Have you heard about the Isle of Man Food Provenance label?*** And also :**How important is it for the Island's products to display the Food Provenance label?** With regards to the Isle of Man Food Provenance Label, 75% (67% in 2020 and 81% in 2019) of the exhibitor respondents claimed to be aware of it - and 78% (80% in 2020 and 77% in 2019) of exhibitors felt it was important for the Island’s products to display the label.

The **advantages of exhibiting** at the show this year were very similar to previous years and primarily described as *raising awareness*, *exposure* and *generating sales* as well as meeting other producers and having direct contact with customers. The **disadvantages of attending** appeared to centre on *costs* and *time input* as well as *general business logistics*.

Venue: For 2021, a new question was added: ***To facilitate its future growth and development, would you attend the Isle of Man Food & Drink Festival at an alternative location****? Please tick all that apply.*

Responses were as follows:

|  |  |
| --- | --- |
| Yes, anywhere on Island | 42.3% |
| No, the event should remain at the Villa Marina | 42.3% |
| Nobles Park, Douglas | 53.9% |
| Knockaloe Farm, near Peel | 38.5% |
| Other (please specify) | 15.4% |

‘Other’ comprised of:

|  |
| --- |
| The Nunnery |
| Douglas/central - agricultural shows to far to get to hence why we don't attend |
| MUST be Douglas. Villa is perfect as so central but if outgrown villa then must remain in Douglas. Nobles Park is a great option . |
| Villa marina or knockaloe would be preferred but happy anywhere on island really |

**Additional comments regarding improvements** (a sample) were:

**Prior to the show:**

|  |
| --- |
| * Wifi rubbish |
| * Handwashing station no soap |
| * Parking |
| * Promoting bus service |
| * Promoting to tourists in hotels |

**During the show:**

|  |
| --- |
| * Ground muddy. Support amazing |
| * the level of the ground at exhibitors stands is something that needs to be considered – why was I moved last minute with no communication |
| * Toilets not sufficient |

**After the show:**

|  |
| --- |
| * The ability to sell bottles of from our stand was a great benefit, and very well received. Thank you |

**Any other relevant feedback included** (full transcripts)**:**

|  |
| --- |
| In order to make it more worthwhile I suggest the registration fee be lowered if possible |
| I think the marquee ground could be covered to make for a better experience in case of inclement weather. I think maybe some other "entertainment" Hello Little People for example could offer a quick local produce/food themed show 2/3 times per day - or get them/other energetic hosts to tour the grounds getting people involved in tastings, activities etc....... More competition type things like the chilli tasting which looked a great success Biosphere - needs to be more prominent on producers stands and also have a bigger presence at the show as it's a huge bonus for our Island. |
| Very pleased, always have a lovely day. |
| Great atmosphere at the Festival |
| Huge thanks to you all for another hugely successful event - it really is the highlight of the year for food producers (in my opinion). |
| Always a great show. We do well out of contacts as well as direct sales and potential bookings. Thankyou!! |
| great organising- well done all involved. Friendly atmosphere and great collaboration and support between stall holders |
| I was in the second (small) gazebo which was being shared with “Allergy Village” and a Vegan Bakery. There was therefore an understandable misconception from the crowd that this small area was for allergy / special diet foods only. This was made more difficult by the “Allergy Village” signage - a number of people told me they thought that was the name of the gazebo area. Therefore anyone who came down to the gazebo did so because they wanted to visit the “allergy village” for allergy or diet specific foods - neither of which I could supply. The footfall down to the gazebo was also very minimal, except for when we went out and actually asked the public to do down there. I sold about 20 items only on day 1. Not much greater day 2. I was told that I wouldn’t be suited to the main tent for next year as that’s for Manx producers (I don’t know what else I am really?? I was as much a Manx producer as anyone else at the festival? So I’m a bit confused by that...). I was also really disappointed to see that the three of us in the gazebo weren’t considered in the judging for the best stand as I had worked really hard to make the stand attractive as directed - it would have been nice for someone to at least look at it. Instead I just felt like a bit of an outsider to what was going on really. On the plus side the publicity I got for the cake sculpture has been exceptionally pleasing so perhaps it will be financially worth it in the long run. |
| I felt the entry fee put a lot of my customers off coming. It was also quite expensive for me to take part as a whole although I am very pleased with how the event was run and we had a great event. All the staff I have dealt with through the process have been wonderful |
| GOOD EVENT, GOOD FOOTFALL, WELL ORGANISED, FRIENDLY STAFF, EVENT SAFETY MANAGEMMENT WERE EXCELLENT, PETER YOUNG AND TEAM ALL GREAT, AUDREY FOWLER, AND TEAM BRILLIANT, AUDREY IS 65 NEXT YEAR BUT SHE NEED TO BE ENCOURAGED TO STAY, IS A MAINSTAY OF THE EVENT. WELL DONE EVERYONE, FROM DAV ISON'S ICE CREAM |
| We will be much wiser next year. Overall the festival was a good experience for us and we learned a lot from other exhibitors, made a lot of new contacts in the same industry. Enjoyed the atmosphere and all those at DEFA and the Villa were very helpful. |
| One of the best events I’ve ever participated |
| Stated above that it should stay at the Villa Marina, but if it continues to grow in size and villa gets too small, I think it should still stay in Douglas, but unsure where. |
| Great event thank you, good footfall and layout lends itself very well to allowing visitors to relax and take their time. |
| Entrance fee may have a room to decrease |
| Not enough rubbish bins on site, nobody clearing tables etc at the food court encourages the wasps! As 1st time exhibitors we thought somebody may have checked how we were getting on and if we needed any info etc, we didn’t know that we could of parked a vehicle at the back of the tent which would of helped us immensely |
| Manx Utilities are a major stakeholder in REFILL IOM but this did not seem to be being promoted although many of the other organisations there would have been using mains tap water to support their presence/presentation. |
| There should be pre-show interviews with all exhibitors to build hype. Include food vendors in ‘best in show’ stands. Ensure food vendors adhere to being Manx…not advertising and selling German hot dogs for example. |
| From the point of view of a drinks exhibitor I can only say that the licensing situation was a hinderance to any success that comes from the festival and while I thank the villa marina where excellent in the help they offered and made things run as well as thye did, I think this is definately an area that has to be improved upon in future. As not only does it prevent us from giving a full customer experience it also prevents any involvement in the presentations and events of the day outside of the drinks pavillion. For example no potential for food and drink pairing or talks as have taken place in previous years with for example outlier distillery or the hooded ram brewery.  Additionally The drinks pavillion needs a rethink as it is mostly just seen as the location of the festival bar and the exibhitors in there are not really highlighted on the day of the festival. |
| Another successful IOM Food and Drink. Only thing I would mention is that some exhibitors used single use plastic, in carrier bags, smoothie cartons and drink samples which I was disappointed in |
| The inclusion of Live Animals opposite our stand was not helpful and resulted in many customers complaining. The Food & Drinks Festival is that, not an Agricultural show.. More seating and tables need to be provided for both good and incremental weather for the future. This should be priority over and above livestock being on display!! |
| apart from the parking issues I enjoyed our first year having a stall. I have attended as a member of the public for years and have never been able to find allergy friendly snacks for my child with multiple food allergies so was very happy to provide that service and chat to the public about their allergy/vegan/gluten free needs. |

# Key conclusions

* The core elements of the festival in its current format continue to be perceived to be delivering value to the majority of respondents of the survey and there is a very high (more than two thirds) level of repeat for visitors to the Food & Drink Festival
* 199 people entered an email address to be entered into the competition and the majority have indicated an intention to attend again in the future – the Festival is therefore clearly of repeated interest for consumers and the hamper competition is of benefit in encouraging respondents to the survey. There remains however, room for improvement in numbers of responses to the visitor questionnaire
* Key attractions to the Festival are:

|  |  |
| --- | --- |
| * 1. Food /produce | * 1. Atmosphere |
| * 1. Friendly | * 1. Range of produce |

* Respondents dislike:
  + Queues, lack of diversity of stalls, seating and a number of other minor things, eg wasps
* The levels of awareness of the Isle of Man Food Provenance Label amongst consumers remain high with more than two thirds of respondents being aware of the label but with the vast majority feeling it important that the label be displayed
* To use this year’s figure for estimating the economic impact of the 2021 event, we are taking the estimated number of adult entrants (8827) with their stated average spend (£41.36). **This would suggest an economic value of £365,085** (compared with £432,080 in 2020 and £225,000 in 2019) which remains high. This figure is based on DEFA reports of **8827 adult entrants with a reported average spend from the survey of £41.36** (very slightly higher than last years’ average spend) – it does not include any profit from gate entry paid.
* The majority of people said they were aware anyway of the event now that the event is so well established, but for promotional influence it appears that social media now has significantly more influence than local press and radio
* The majority of respondents were as to be expected local residents (with around 10% visitors this year)
* The 28 Exhibitor respondents continue to be generally satisfied with the festival from the point of view of achieving their business objectives, including raising awareness, generating sales and facilitating direct contact with customers.
* The arrangements *prior* to the festival were seen as well organised from the exhibitors’ points of view and were also seen to be good *during* the show, despite very minor aspects of dissatisfaction, such as position of stand/ground space and organisation.
* Further follow up from DEFA is identified again this year as an area for potential development after the Festival has taken place
* **Almost all** plan to exhibit at the Isle of Man Food & Drink Festival in the future indicating a high level of satisfaction with the event
* **With regards to the new question relating to the location of the Festival for its future growth and development,** visitor respondents had a slightly different perspective to that of the Exhibitors in that 56% visitors said they would attend anywhere on-island, indicating a high level of loyalty – this compares with 43% exhibitors agreeing anywhere on-island. The next most popular choice with visitors was Villa Marina (34%) followed by Nobles park (19%) – this preference was reversed with exhibitor respondents (42% and 54% respectively). Knockaloe Farm near Peel was a poor choice for visitors (7%) but much more popular for exhibitors (39%).

# Recommendations

1. Ensure a continued focus on local food and drink to ensure a unique proposition in comparison to the Royal Manx and Southern Agricultural shows and continue to focus on a **wide diversity of producers of food, drink, craft and other** which is clearly local
2. Continue the priority for **ticket numbers** and entrants to the Festival to be accurately collected to be sure of the number of adults and children purchasing/entering at the gate – it is highly recommended that detailed training for gate staff on the importance of numbers is carried out and that this opportunity is also used to help them understand the **importance of gathering feedback** – several instances where gathering feedback could have been raised amongst attendees
3. Continue to monitor the **overall return on investment** for the festival in its widest sense (including exhibitor / sponsor revenues) in order to be able to create the necessary business case and feedback to participating stakeholders going forward – the number of visitors and their estimated spend should be monitored carefully
4. Consider ways of stimulating a wider breadth of purchasing across exhibitors – the average remains at around 4 businesses that visitors buy from – consider schemes to help widen this
5. Consider additional ways to increase the value of the event without necessarily increasing numbers of visitors or exhibitors – this may be possible with pre- ad post- event activities and training to help exhibitors exploit their contacts themselves
6. Promote the Isle of Man Food Label amongst consumer as well as exhibitor audiences to increase awareness and reinforce the value of provenance
7. Continue the **appeal** of the festival by the incorporation of ‘celebrity’ chefs and cookery demonstrations.
8. Maintain good numbers and diversity of caterers/coffee stalls and appropriate seating/space to optimize the eating/drinking experience for attendees
9. Promotion for the event continues to be key. It is strongly recommended that a multichannel supporting campaign is implemented with very targeted objectives to maximise awareness and value prior to the event as well as generating engagement for follow up post-event and leading into the following year’s events
10. Explore the opportunity to promote to or to engage with off island audiences via direct marketing or targeting the hospitality sector receiving visitors where possible
11. Engage with exhibitors to promote what changes/improvements have been made year on year to encourage participation in future feedback to ensure the event continues to deliver very good value for the exhibitors and regular attenders see the value in responding
12. Ensure the winner of the hamper is selected and that this is exploited/ promoted if possible for awareness
13. Continue the research as the Festival matures to continue to monitor economic contribution, fine tune areas for improvement and promotion, and maintain engagement and the number of respondents to research by  
    a) ensuring the hamper prize is featured prominently  
    b) ensuring all door staff understand the importance of promoting feedback and integrating with promotional campaigns – this is an area that has traditionally been highlighted as an area for improvement

c) ensure the promotional campaign fully integrates the feedback- eg Tell us what you think posters with QR codes, increased prominence on social media platforms etc – facebook promoted posts could target visitors to help increase the number of online survey completions to help maximise the value of the research

d) the research is promoted throughout the event on radio/social/around the seating areas etc

1. Consider carefully the question of if and how to change the venue and manage the differing expectations of visitors and exhibitors in that respect – it appears that there will be a loyal following around the island, but the majority preferences appear to be for Douglas. Knockaloe Farm appears to be the lowest preference for visitors and this should be borne in mind when considering the differentiating factors to the Agricultural shows which, at the moment are highly differentiated from the Food and Drink Festival.

# Visitor Feedback tables

# Visitor Questionnaire



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# Exhibitor Feedback tables

# Exhibitor Questionnaire

   