

Pembrokeshire Fish Week Festival

Saturday 23 June -
Sunday 1 July 2013

Festival Report



Pembrokeshire Fish Week Festival Report 2013

This report is a working document for festival organisers, funders and supporters.

Background to Event

Pembrokeshire Fish Week Festival is a county wide event, held annually in the shoulder season of late June to early July. Built around the theme of 'fish', this award winning festival utilises the natural assets of the area, to increase its profile and potential as a food tourism destination and bring economic benefit to the community.

The festival is seen as a growth event working towards becoming a major event in the national calendar, with a focus on supporting Pembrokeshire local food and drink producers, its fishing industry and tourism economy.

The festival is unique in its involvement of the whole community of Pembrokeshire. Starting around the main opening day on Milford Fish Docks on the first Saturday of the festival, which hosts a food and family based celebration, is a diverse programme of events and activities spread across the breadth of the county. The programme is developed through the involvement of just under two hundred and fifty businesses and organisations, featured around fish, shellfish and local food, eating out, demonstrations and cookery, angling coaching and competitions, on water and coastal adventure and outdoor activities, environmental and educational events, arts, crafts and culture. The festival is described as an excellent example of a sense of place.

Festival Management Structure

After previously being supported through European programmes, from 2012 the festival has been working on developing its management structure, strategic planning, financial management, marketing, public relations and fundraising. The support of major events and food festival funding from Welsh Government has enabled this to progress. A targeted approach to increase sponsorship, and in kind support of facilities and resource with local businesses, especially for the open day, through PCC Regeneration is also assisting with increasing the sustainability of the festival.

The festival is delivered by the Pembrokeshire County Council Food Development team, in the Regeneration division within the Development Directorate. The team consists of Kate Morgan, Food Development Manager and Joanne Welch, Food Development Officer, who both have additional responsibilities supporting the agri-food industry and economy in the county.

To support the team in delivery of the festival, a freelance events manager Martin Peirce was contracted for a second year to assist in the running and strategic development of the festival opening event. A project based festival assistant Sarah Lacey, was employed from March to September to assist with administration and marketing. Sarah is an English and creative writing graduate, which proved an invaluable resource this year for compiling press releases and articles in the festivals PR campaign and in completion and analysis of surveys.

As part of the exploration of setting up a new independent entity whose role is to support PFW festival, whilst maintaining the administration and main staffing within PCC, a Pembrokeshire Fish Week Festival forum was formed in Spring 2012 initially as an advisory group. The forum members were brought together to bring in appropriate high level skills, commitment and expertise. Forum members consist of Richard Lynch, owner proprietor of Element Domes events and a free lance camera man, Zoe Wright, head of marketing Folly Farm, Guy Woodham manager of The Torch Theatre, Nia Marshall, NMR human resources and Cywain fisheries officer, Huw Thomas managing director Puffin Produce, David Evans, head of accountants Pembrokeshire College, Marten Lewis, Manager of the Darwin Science programme, Paula Ellis, Manager of Oriel y Parc, PCNPA. Kevin Doolin, social enterprise officer in Regeneration also attends to advise. The forum was maintained throughout the 2013 festival, and proved an invaluable asset to the festival organisers both for advice, contacts and stimulating ideas. Throughout winter 2013, early 2014 we will look at progressing this forum, especially as more contacts are now being made with local businesses to elevate their interest in the festival.

Mission Statement

"Pembrokeshire Fish Week Festival's mission is to help promote, develop and sustain Pembrokeshire's significant local food and fishing industries, culture and heritage by offering an innovative and exciting tourism event for both locals and visitors"

Vision

"The vision is for The Pembrokeshire Fish Week Festival to be recognised as a premier event of its kind, attracting both national and international acclaim and making a positive contribution to the overall economy of Pembrokeshire and Wales, whilst achieving genuine sustainability"

Visitor County/Local Residents Survey Analysis

During the festival a team of people are contracted, mainly internal PCC staff to carry out face to face surveys on both visitors to the area and locals attending and taking part in the festival. A variety of locations and activities across the programme are used for taking surveys to ensure a cross section of interests and people were covered.

A target of 500 surveys was put in place, however the mixed and unseasonably cold weather in the week meant some events targeted were restricted in what they could deliver, or unable to take place, or simply attracted fewer people such as in the case of Tenby Music and Mayhem and D13, as previously mentioned in the report. In all a base of 366 surveys were collated. This has still enabled us to capture beneficial data to gauge the economic impact of the festival.

Visitor Survey Analysis

This year's surveys showed an increase of 6% in visitors to the area during the festival as 32% were from outside the county compared to last year, which was at 26%. This shows the rise in profile of the event and its ability to attract visitors to the area. The largest figure of 39% is for county residents travelling over 5miles to events and activities, which shows that the festival stimulates the local community to travel to other areas of the county to support activities during the festival.

83% of those interviewed were aware it was PFW when questioned, which is down on last year but still shows excellent awareness. This could be due to survey assistants asking people outside of the main event areas to increase target numbers.

Although car is still the main form of transport used, it is good that use of public transport has increased. Travel by train has risen to 3%, and bus is at 5%, including the coastal buses. This shows the work with Arriva and Travel Line Cymru to encourage public transport for environmental benefits is beginning to show success.

When asked how they heard about PFW, word of mouth is still the most successful marketing at 30%, with been before at 19%, showing the success of the festival in obtaining repeat visits. The PFW festival brochure and

promotional material can be added together as they are in essence the same thing, which at 26% makes this the next most important marketing tool. Next year this will be as one question to avoid confusion. For the visitors, national press and website have both increased on last year. As visitors you would expect the local press and radio to be lower. It is interesting that the social networks were used more by local and business than by visitors too.

Eating fish, cookery and demonstrations, and environmental events such as beach days walks etc, continue to be the most popular events and activities for visitors.

The open day, family events and try fishing days, coming almost equal in popularity behind the first three. Outdoor adventure, coastering etc, are still hardest activities to attract high visitors too, this could be down to the expense of this type of activity and the main visitor age bases being those with young families or 40years and over.

94% of those questioned said they were either enjoying or really enjoying the festival, with 98% saying it was beneficial to Pembrokeshire.

Of the visitors attending from outside the county, 49% of these were from England, just under half, which shows our marketing campaign, is successful in attracting visitors to this area of Wales. 39% were from the rest of Wales, which excludes the counties of Pembrokeshire, Carmarthenshire and Ceredigion. The majority of those visiting from England were from South England 18%, closely followed by the Midlands at 17%. Most encouraging was the rise in overseas visitors this year, from 0% to 5%, with visitors coming from as far as Chile, Hong Kong, as well as Europe including Lithuania and Holland.

Over half the visitors attending, 54% said the PFW festival had had some or was the main influence on them visiting Pembrokeshire. This is a 10% increase on last year, showing the increase in profile and popularity of the event and its ability to influence decisions to come to Wales.

Of those not influenced at all to the area by the festival, now they were here, over half said they were now influenced to join in and take part in the festival. Of this same group, the coast line and beaches were still the strongest influence with nature and wildlife, the national park, outdoor activities and family and friends being almost equal in influence between 12-15%. The visitor breakdown shows over half are visiting as couples with 46%

of these over 45yrs. 17% visiting are children under 18yrs. This suggests PFW attracts mainly those who are semi retired, retired or empty nesters, as well as those with young families, mostly under school age. The 26yrs to 35yrs being the hardest age group to attract. These age groups also tie in with the activities and events that are the most popular. This information plays an important part in planning the event programme and in marketing campaigns.

Self catering is the most popular form of accommodation, closely followed by caravan and camping at 25%. Caravan and camping is showing a 7% increase on last year, which could be an influence of the current economic climate. Slight increases are showing on those staying in both hotels and B&Bs this year. A new question to look at those staying in resorts such as Bluestone or time shares shows 3%.

It was encouraging to see the numbers staying in the area for between 2 and 6 days has increased by 14% to 51%. This shows people are taking part in the festival over the week, and could also be down to the current economic climate where short breaks in Britain are rising in popularity and self catering establishments are changing their offer accordingly, and it also fits in well with the independence of the caravan holiday. Just under a $\frac{1}{4}$ questioned are staying a full week, which is down by 6%; again this shows the influence of the current economic climate. The number of day visitors has also dropped, while those staying over a week have risen to 14%.

The majority of people questioned were attending the open day, but it is encouraging to see that over 16% were spending between 3-7 days attending events and activities within the festival, and just under $\frac{1}{4}$ attending at least 2 days with in the festival. This shows the popularity of the festival as something a visitor can dip in and out of during the week.

The amount of spend per head at the festival was down this year, at only £83.00 per person compared to over £90.00 per head last year. This is influenced again by the current economic climate and visitors having less disposable income. This drop in spend ties in with the business survey results on increased sales too, as seen later in the report, and with findings of similar surveys undertaken by organisations such PCNPA.

Of those surveyed, 14% of the visitors had not been to Pembrokeshire or the PFW festival before. This is double the figure of last year, again proving the importance of PFW in influencing people to the area. 34% had

been to Pembrokeshire but not the festival before, with 26% saying they would visit Pembrokeshire and the festival again. 22% had been to Pembrokeshire and the festival before, up by 6% on last year. Both these last figures show the importance of the festival in attracting repeat visits to the county.

We are seeing an increasing amount of enquiries requesting to confirm the PFW festival dates, as they are making bookings to coincide with the festival. The top words used by visitors to describe the festival are family, friendly, tasty, fun and interesting. This is part of the appeal of the festival and we need to make sure the programme satisfies or exceeds these expectations but does not lose sight of why the visitor is coming to the festival.

Local and county resident analysis

100% of local and county residents knew it was PFW, showing the marketing in the community is really working. 80% of these use cars to get events and activities, with between 0 and 1% using public transport or bicycles. As expected the local papers and radio have much more influence in the county than with visitors, 12% using local radio and over a $\frac{1}{4}$ the local papers. Word of mouth, still being the biggest marketing tool, 18% using the brochure and promotional material. Facebook and twitter were surprisingly low figures, especially as the amount of businesses using this for marketing is quite significant in the business survey.

As with the visitors eating out, the open day, cookery and demonstrations are the most popular activities. 96% of those questioned were enjoying PFW and will attend the festival next year. This also shows the following the festival has in the local community.

Business Survey Analysis

107 businesses and organisations were surveyed following the festival. These were a mix of those directly involved in the festival, from a cross section of sectors, including fish retailers, hospitality, fisheries, and boat trip owners. 61% were from the hospitality and restaurant sector, being the largest sector getting involved. Out of those surveyed, between 85 and 89% rated the pre-event communication, advertising and publicity, promotional material and overall organisation as either good or excellent, showing a high rate of satisfaction.

91% of those asked put on an activity, event or special menu or offer during the festival week. This shows the majority of those taking part see the benefit of embracing the festival to make it successful for them.

There is also a good increase in participating businesses using other means of marketing to work alongside the PFW festival marketing, from social media, specials boards, posters, own websites, blogs etc. This will help them maximise the benefits from taking part in the festival. 57% used the downloadable branded marketing material available from the PFW website; this is up by 19% on last year. This not only strengthens the marketing over all but also the festival brand, which will in turn help increase profile.

There was a strong consensus from the businesses that events such as PFW should be supported as they benefit the county, and to many it is an annual calendar date for their business. This shows the buy in from the county businesses into the event, which needs to be nurtured, if we are to sustain the festival.

Just over 1/5 of the businesses worked in partnership with another businesses, to promote revenue, public relations, and because it works well for their particular business. However for the majority they prefer to work independently.

When asked if they had seen an increase in customers in the festival week compared to an average week in June, 60% saw an increase, which was up by 20% on last year. 11% of businesses reported an increase of 50% or more, with the majority seeing an increase of between 10 and 29% increase in customers. 46% saw an increase in sales, with 15% of these seeing an increase of over 50%. However this was only 26% up on those seen in last year's PFW. 62% seeing no increase on last year's PFW, which probably reflects the current economic climate and goes hand in hand with the drop in visitors, spend per head, despite the increase in visitor numbers to this year's festival.

74% said the PFW festival was beneficial to them in other ways as well as increasing customers and sales. These included, raising profile, allowing them to try different menus and ideas, good to be part of the marketing, benefits the whole town, if you don't take part you lose out. 54% agreed the festival generated additional income for them, which are up by 16% on last year's figure.

Only 21% changed their margins for the festival, the majority dropping prices. 9% employed extra staff during the festival, which shows there is some

influence on employment by the festival; some businesses said they just increased current staff hours. Of those employing more staff, between 1 and 5 part time staff were employed, with one person employing 2 extra full time members of staff.

19% said they have started new menus or products as a result of taking part in PFW, showing the importance of the festival in providing a platform for innovation, trialling new products, menu dishes, and ideas, which can increase the quality of our tourism offer.

45% used the PFW branding in their advertising and marketing, as it increased their business opportunities. This is also important for the festival in increasing the brand recognition and awareness.

94% of businesses said they would be taking part in the festival next year, demonstrating the success of the festival in getting businesses participating and feeling some ownership of the festival, with 89% saying the festival is a benefit to the county. Their activities provide the majority of the programme content for PFW, without the business participation there is no festival.

Despite the mixed weather during the festival week and current economic climate, the results show the festival had a very positive economic impact in the county, especially to boost the shoulder season. 98% of businesses would like to see the festival continue, the other 2% had not replied. 57% of those surveyed said they would consider contributing to ensuring the festival continued the majority offering in kind contribution rather than financial, such as accommodation, use of chefs, competition prizes.

Funding and Sustainability

Moving away from the European funding programme over the last two years, although challenging in retaining funding to run the festival, has meant that more can be put in place to drive sustainability of the festival, and where possible to build up reserves.

The major events funding is also declining and this gap will need to be met for next year.

The funding obtained this year from WG festival funding was 20k less than we had originally budgeted for the 2013 festival, leaving a large shortfall in funding to fill.

Cuts were made on some items such as some printed materials, reusing older banners etc which will have to be replaced next year. To keep up the quality and standard of the festival, and at the profile it has achieved plus to grow it to a major event, it is impossible to make cuts which could compromise the festival in content and quality.

Sponsorship is a hugely important part of the income for the festival, and we have managed to build on the value of the sponsorship over the last two years. This is both financial and in kind. To obtain more financial sponsorship of significance, input is required of senior officers and members in PCC to obtain support. Joint approach to sponsorship by the head of Regeneration, Martin White and festival officer Kate Morgan, was successful in obtaining some sponsorship both financial and in kind. It also led to building an excellent working relationship with more local businesses, one such business, whose input helped save many financial costs and provided extra resource in the form of man power too. It is hoped we can build on this approach getting buy in and a feel of community support, which will assist in the long term sustainability of the festival. This will require extra support from senior officers to get some of the larger developers and businesses on board. The buy in of businesses partaking in the festival is also really important. Businesses put on extra events and activities outside their normal offer for the festival, and without them there would not be a festival for us to market and entice visitors to the area. Many also provide support over and above for the festival, mostly in kind such as accommodation, competition prizes, use of venue or chefs etc. We cannot underestimate the value of this support.

Income to the festival has also been increased, this has been through:

- Increased stall and franchise fees,
- Entry fees to the open day
- Advertising revenue
- Shared facilities costs
- Workshops and demonstrations

Fees have to be kept in line with other similar events, and it is unlikely we can raise these fees significantly if at all for next year. Other avenues of income are being explored.

The hiring in of the onsite manager for the opening event also helped in building up good working relationships with local businesses, which also led to less financial costs. In kind assistance through loan of barriers, toilet blocks, marquees etc were invaluable this year in helping us meet the funding gap. The manager's experience in organising facilities such as electrics, layout etc, and

building working relationships with the contractors helped in reducing costs and getting best value without compromising safety. The scale of the event is now far too big for the festival team to organise and oversee; requiring professional experience to oversee the onsite contractual set up and set down.

The current high profile of the PFW festival, and the reputation it is getting as a driver in the local tourism and food and drink economy, is something we need to capitalise on to build up the relations with local interested business clients. This is one we should increase, as we look to set up a board of directors in the future as part of the recommendations of the report on the festival sustainability. In research of the organisational structure of successful festivals such as Abergavenny, the mix of business experience on their board is significant. The increased input from other local attractions and theme parks, taking part in PFW, will also help to increase the business input. Theme parks such as Anna's Welsh Zoo, Folly Farm and Oakwood, took part this year, with Pembroke Castle coming on board next year.

Volunteers also play a huge role in the festival. Without the volunteers making up the shortfall in manual resource, the cost of running the festival would increase significantly. The volunteers currently come from various sources including students, family and business community volunteers such as those from Valero. Again in research with other festivals, volunteers play a big role in their sustainability, keeping costs down, enabling items such as workshops and crafts and ensuring community buy in. As we work towards more private business and public input, we hope that volunteer input can be increased, which in turn will assist in the festival sustainability.

Economic Impact of the Festival

The overall attendance to the 2013 festival over the week was 28,870.

This is calculated taking the footfall figures from the main opening event of 12,000, the other main public events, Music and Mayhem in Tenby of 2000, D13 - 2000 and Saundersfoot of 1500. The total number of events and activities in the Feast on Fish and Fish N Frolics were then added up minus the four events already mentioned. In the case of the activities and events put in as on all week, to get an average number of days for these having gone ahead, and to cover any likelihood of them having been cancelled due to weather etc, these were calculated by those in Fish and Frolics multiplied by 4 and Feast on Fish x 5. This totalled 379 events all together. An average number of attendees to events and activities is taken as 30 for a formula to work the total attendees. The overall total then equals 28,870.

The Event Impacts web based Economic Calculator was used to calculate the direct economic impact of the festival in the county using the data collected in the surveys. This was calculated as £2,535,213. This calculation shows that for every £1 invested to deliver the festival, there was a £21.18 investment into the county's economy.