Welsh Food and Drink in Visitor Attractions









Bwyd a Diod Cymru
Food & Drink Wales

What is the 'Welsh Food and Drink in Visitor Attractions' Study?

The study was commissioned by Welsh Government who wanted to better understand the extent of Welsh food and drink provision within visitor attractions in Wales; their reasons for doing / not doing so; and the extent of desire among visitors to buy local Welsh products. Key managerial staff at 44 attractions were interviewed and 587 visitors were surveyed at 13 of these attractions in order to inform the study.

The key findings of our research are presented below, throughout the analysis we differentiate between two broad types of attractions:

- General – attractions that have a generic offer and are not necessarily related to Welsh culture e.g. gardens/parks, lakes, trails, theme parks, wildlife/nature reserves etc.
- Culture and Heritage – these include museums, castles, cathedrals, galleries etc. and the attractions are more likely to be explicitly about Wales and Welshness.

Key findings

Visitor perspectives

Three key measures were used to assess the importance of Welsh food and drink options to visitors at these attractions:

83% of visitors stated it's 'important' or 'very important' to have a range of local and/or Welsh **food options** at these attractions.

88% for international visitors.

62% stated they would be more likely to **eat and shop** at outlets with a good Welsh food and drink offer.

69% for international visitors.

66% would be willing to **spend slightly more** to have more Welsh food and drink choices.

78% for international visitors.

Similar feedback was given by visitors from general and culture/heritage related attractions.

Most (**70%**) visitors also stated that it is important to them that Welsh products are used in the food and drink they buy from restaurants/cafes outside of attractions in Wales.

This figure increases to **86%** for overseas visitors.

In explaining their reasons for this, most (**54%**) highlighted that they think it important to support the local economy and producers, or that they prefer local produce, or that it is important for environmental reasons (i.e. lower carbon footprint).

Eleven percent specifically mentioned their preference for Welsh produce / desire to support the Welsh economy, while **4%** explained that it is part of their visitor experience.

"We are Welsh and I think it is important to use food which is from the area."

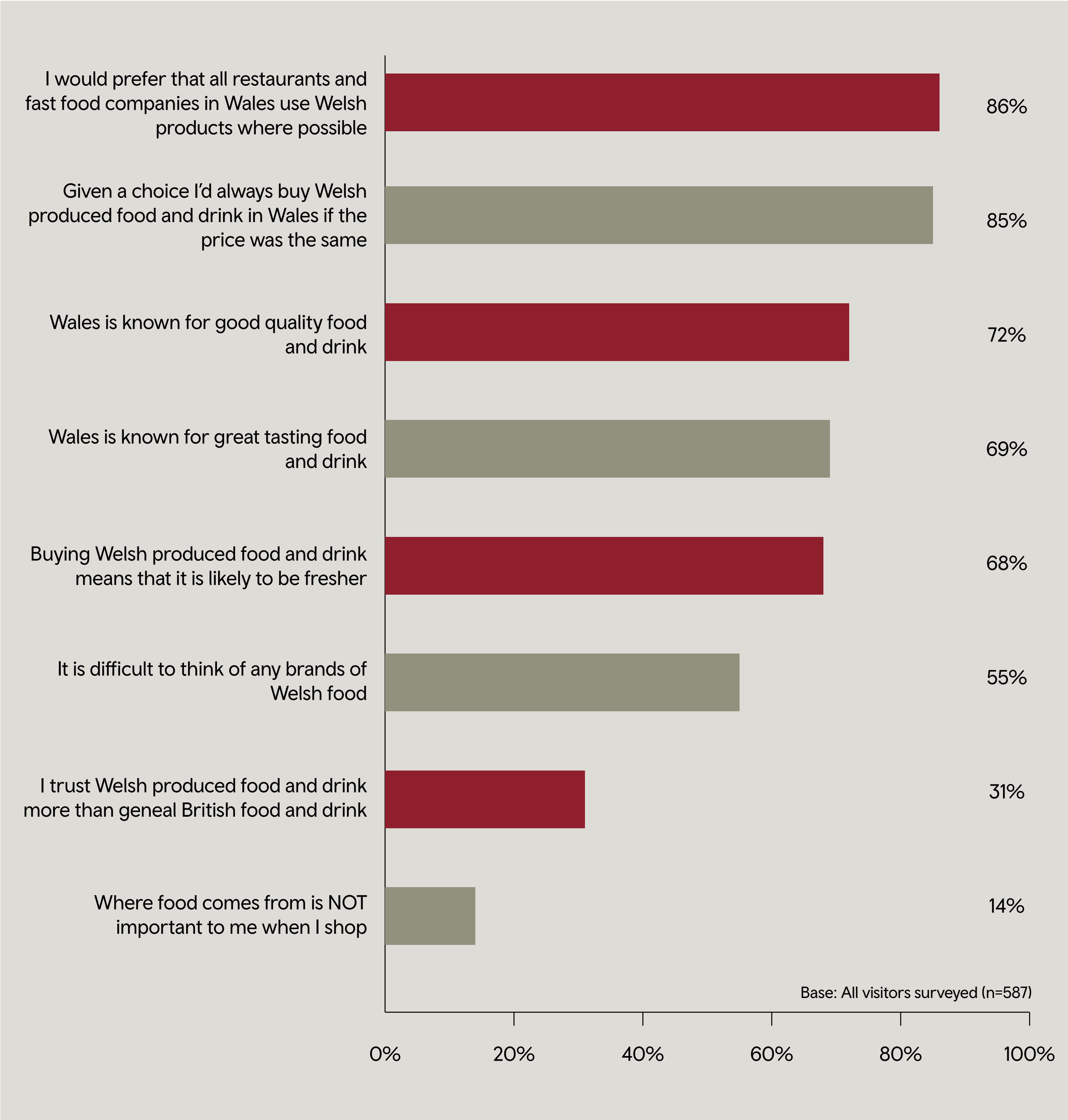
"I like to eat local when I'm travelling to know the local culture and it's less air miles."

Finally, visitors were given a series of general statements about Welsh food and drink produce and asked to what extent they agreed with these – the proportion selecting Strongly agree or Agree is shown below.

These data again suggest that having a Welsh food and drink offer in Wales is important to visitors including where **85%** agreed to some extent they would always buy Welsh produce in Wales if the price was the same.

More broadly, provenance is clearly important with only **14%** stating that where food comes from is not important.

Figure 1:
General perspectives on Welsh food and drink products – % who stated 'Strongly agree' or 'Agree' with the following statements:



Attraction Manager perspectives

On average, an estimated **43%** of total food and drink sales generated at the 44 attractions participating in this research are from Welsh produce.

Most (**64%**) managers indicated that the 'Welsh brand' is important for attracting visitors to eat and/or drink at their outlet. This view is far more widely held among culture and heritage attractions where **81%** alluded to it being important (versus **50%** among general attractions).

> "We get tourism from all over the world… I think it's really important to drive the Welsh brand."
> (Culture and Heritage Attraction)

> "It wouldn't be important for our service because people's primary reason for visiting us is that they're coming for a recreational activity."
> (General Attraction)

The majority (**65%**) of managers would anticipate some form of positive benefits from increasing their Welsh offer with **35%** remarking that it could result in more visitors and around a fifth (**19%**) expect it would improve the visitor experience.

The proportion anticipating positive benefits increases to **73%** among culture and heritage attractions compared to **56%** of general attractions.

> "It will clearly bring in more visitors who want that Welsh experience. It will bring in more income for us and will also benefit local businesses."
> (General Attraction)

The fact that most attractions report they would anticipate benefits from increasing the Welsh offer raises the obvious question of why they haven't done so.

The answer is likely to lie in the perceived barriers to doing so – **88%** believe there are challenges to providing Welsh products.

The cost implications of sourcing Welsh food and drink over supply from elsewhere clearly represents the main barrier for attractions, as identified by **61%** of managers (see Figure 2 on the next page).

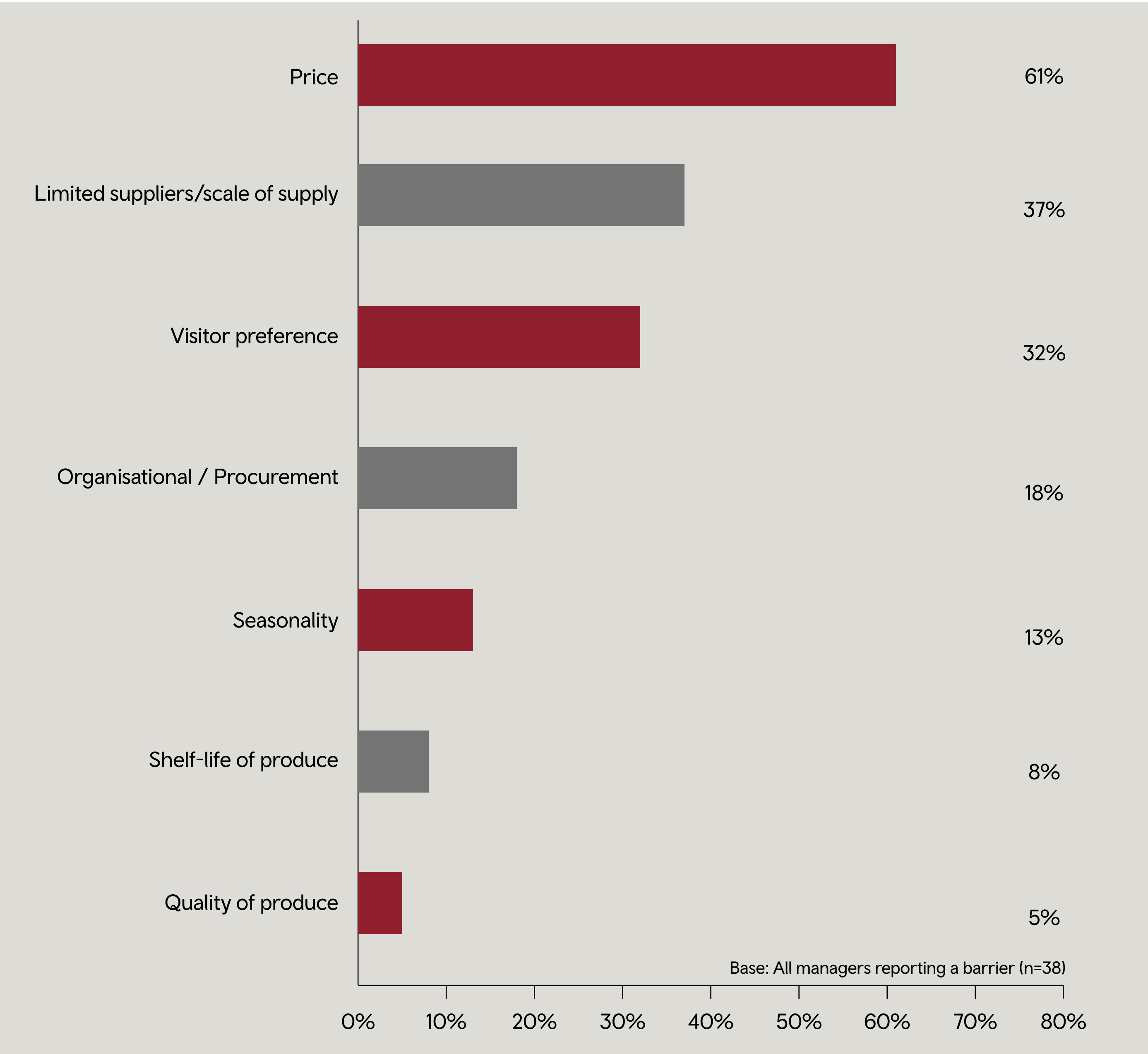
Thirty-two per-cent of attractions identified visitor preference as an issue with many stating that visitors' overriding priority is to purchase the cheapest food and drink possible.

> "People come with their families, it's not cheap to get in and so then people want cheap food in the cafe… so we tend to use a lot of non-local products."
> (General Attraction)

Others (**37%**) remarked that it can be difficult to find local/Welsh suppliers that are of a sufficient scale to meet their needs or that there are limited Welsh suppliers in general. Many highlighted issues to do with reliability arising from a lack of scale and infrastructure, with some Welsh suppliers struggling to provide the regularity and promptness required.

> "Smaller companies find it hard to deliver products when required and if they are not part of a distribution network regular supply can be an issue."

Figure 2:
What are the key challenges in providing Welsh food and drink at your outlet?



Ninety per cent of the food and drink managers interviewed believe it is a realistic and / or necessary goal to increase the offer of Welsh food and drink – both at their attraction and throughout Wales. Most **(79%)** stated that receiving assistance would help in that regard with **66%** suggesting greater promotion / networking links through Welsh Government.

Conclusions

Whilst most attraction managers do believe it is important to have a Welsh offer, many may be underestimating the importance of this to their visitors.

Less than half of food and drink sales in the attractions covered, on average, is from Welsh produce. According to attraction managers, the main barrier to increasing the Welsh offer comes down to price with many commenting that this is the overriding priority for visitors.

However, this is somewhat contradicted by the visitor survey where most visitors reported they would be more likely to eat/shop at the outlet and would be willing to spend more in order to have more Welsh food and drink options.

The findings also suggest that managers in general attractions perceive having a Welsh offer to be less important than those in culture and heritage type organisations. However, the visitor survey data again suggests differently with both cohorts placing similar value in being able to purchase Welsh produce.

The origin of visitors does appear to have a bearing on the strength of feeling where visitors from overseas appear to place greater value in there being a Welsh offer.

The study certainly does add weight and goes some way to confirming that there is scope to increase the current provision of Welsh food and drink in visitor attractions and that this is something visitors want.