



PHENOMENAL DATA. EXPERT INSIGHT.

Food & Drink

Festival Insights





The food and drink offer is important to festival-goers when choosing which festivals to attend



When choosing which festivals to attend this year, how important to you were the following?



The price of food & drink onsite



Diverse selection of food & drink stalls

A major factor

13%

17%

Quite important

34%

44%

A minor consideration

35%

29%

No consideration at all

17%

10%

I would be happier without it

1%

0%



Overpriced food & drink had a relatively profound adverse effect on festival enjoyment last year

- | | | |
|----|---|-----|
| #1 | Wet and muddy conditions | 17% |
| #2 | The price of food and drink onsite | 14% |
| #3 | Favourite bands clashing on the running order | 13% |
| #4 | Queues and overcrowding | 12% |
| #5 | Having to 'rough it' without showers or clean toilets | 8% |

Which of the following was the biggest downer for you at the festivals you attended this year? *Of those with an opinion*

£22.90

Average perceived
spend per day,
per head, on food
at a festival



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£27.19

Average perceived
spend per day,
per head, on alcohol
at a festival

+£1.86

Increase in the average
perceived spend per day,
per head, on food at a
festival (vs 1YA)



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+£2.20

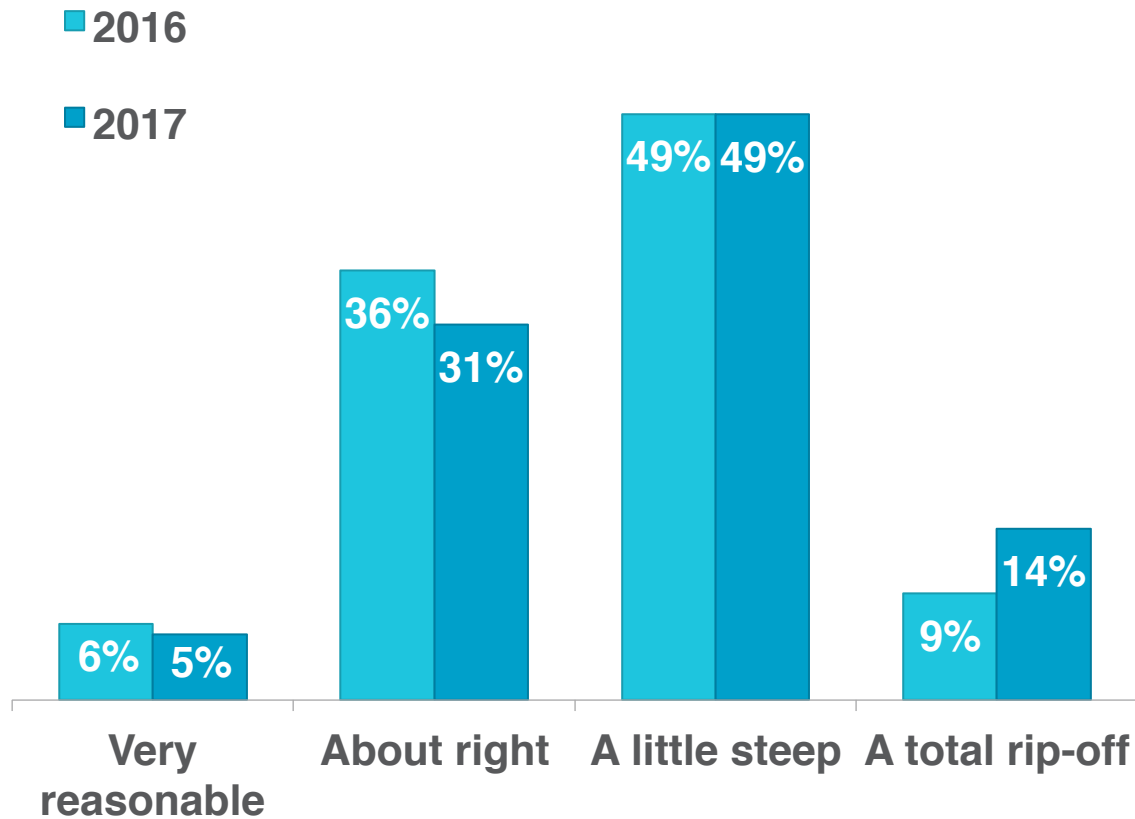
Increase in the average
perceived spend, per
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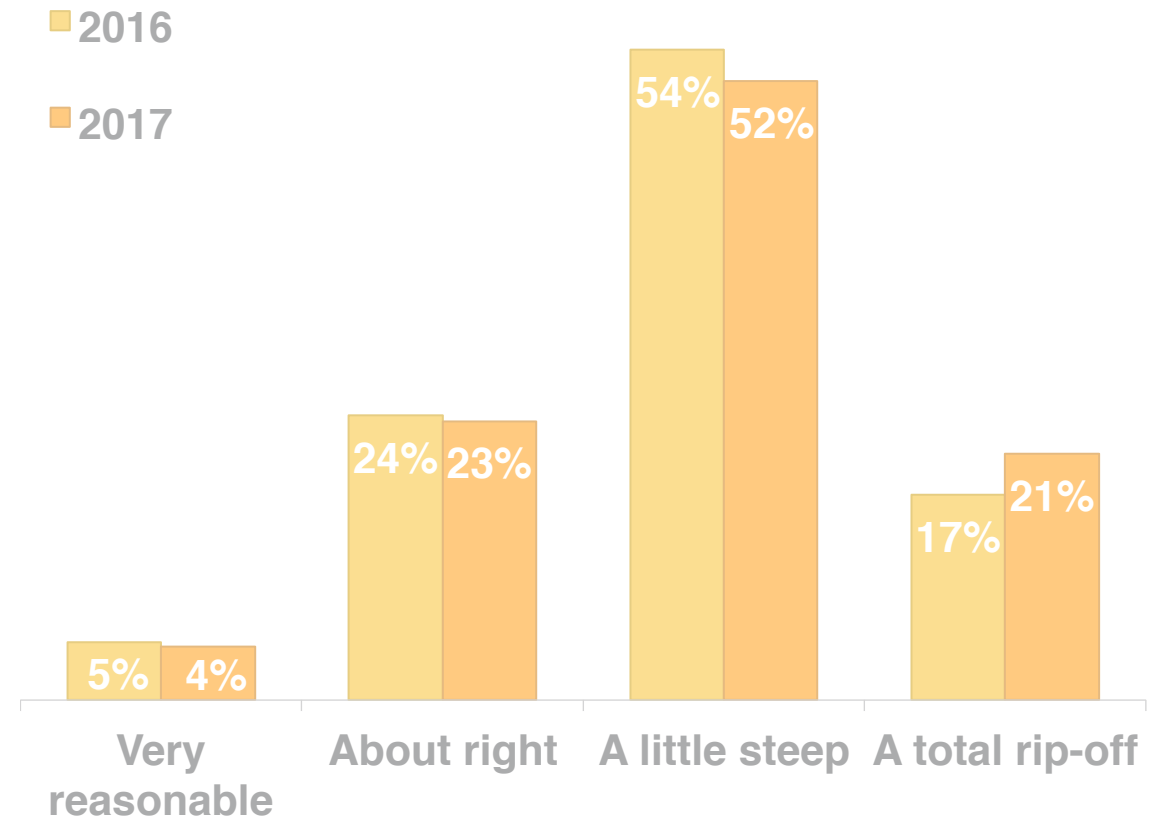
Food prices are viewed as 'a little steep,' with perceptions worsening slightly YOY



How were the food prices?



How were the drink prices?

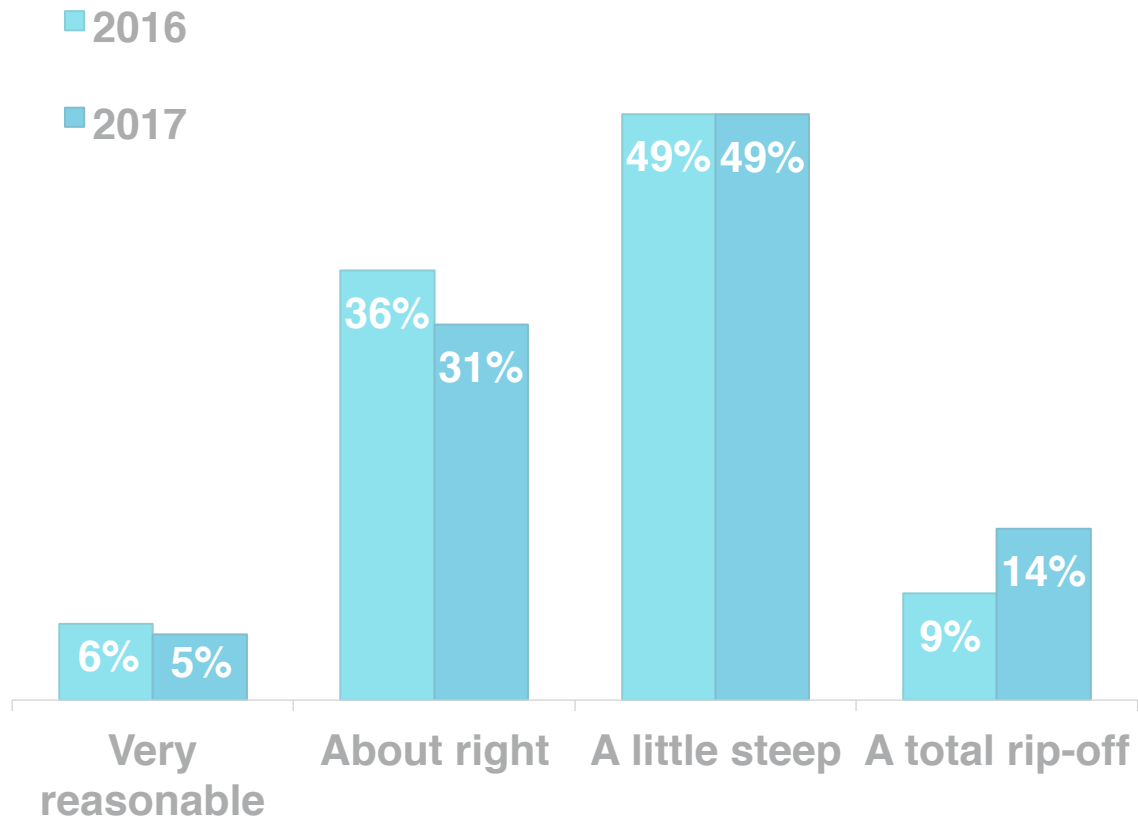




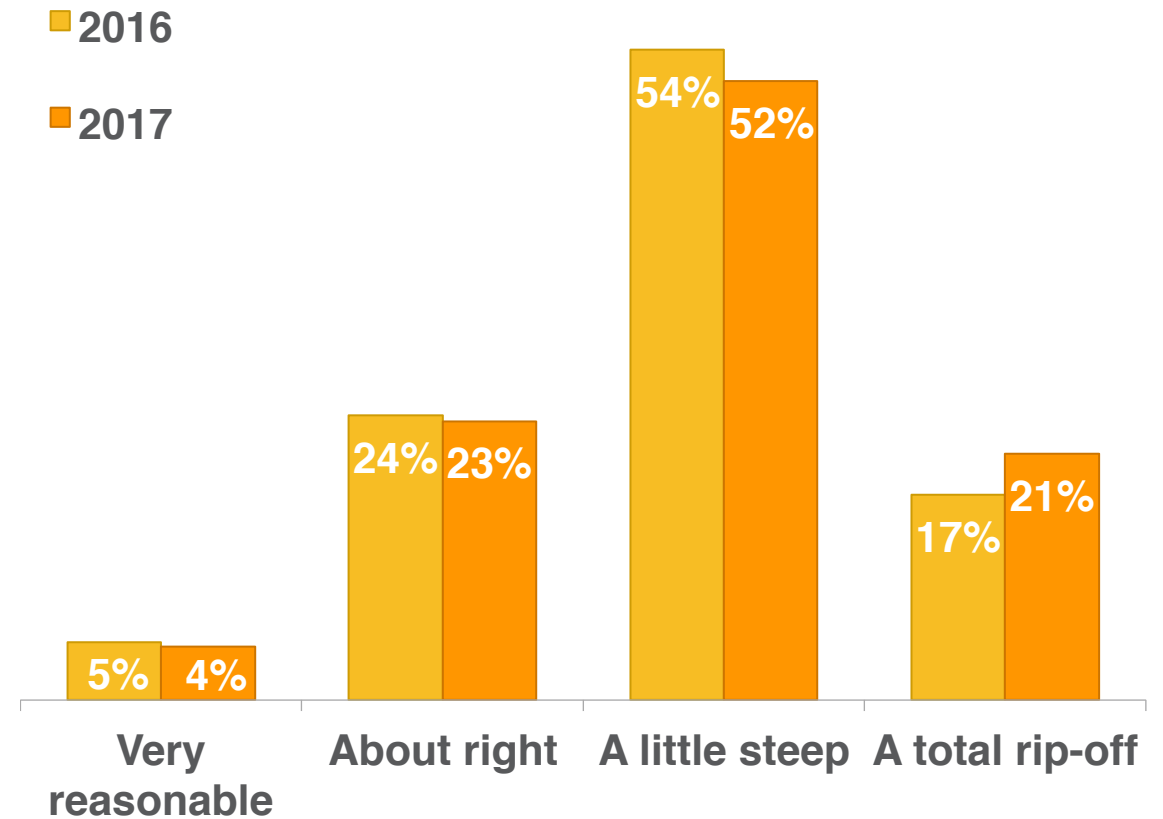
Drink prices are viewed less positively still, with 3 in 4 unsatisfied with costs at festivals



How were the food prices?



How were the drink prices?

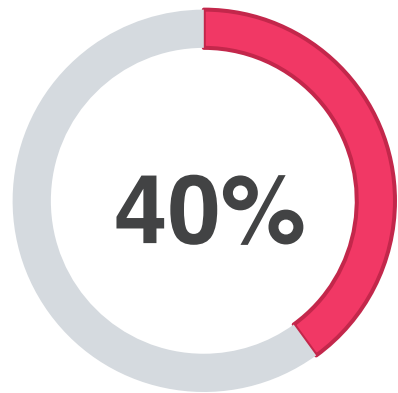




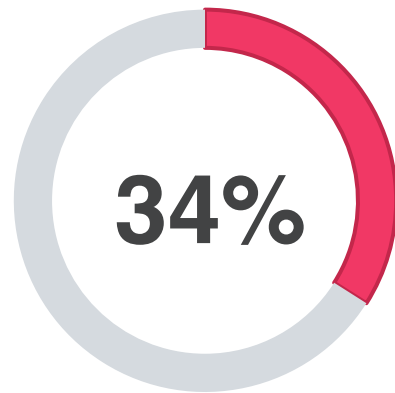
Meal and drink deals present the opportunity to reduce perceptions of unreasonable costs



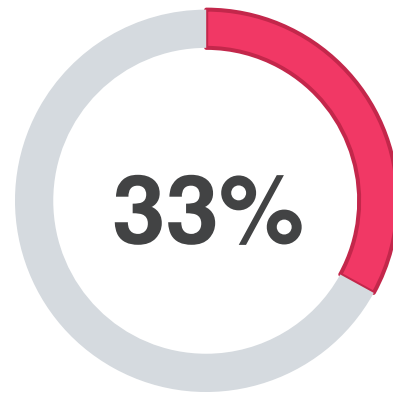
Which of the following do you think would most improve your experience at festivals?



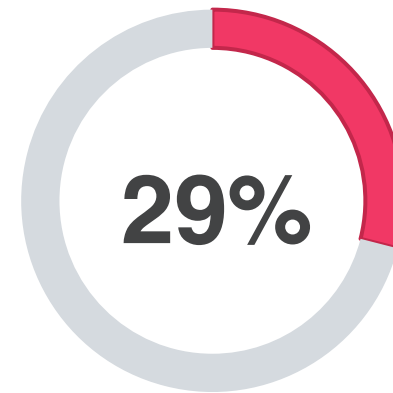
Meal and drink deals



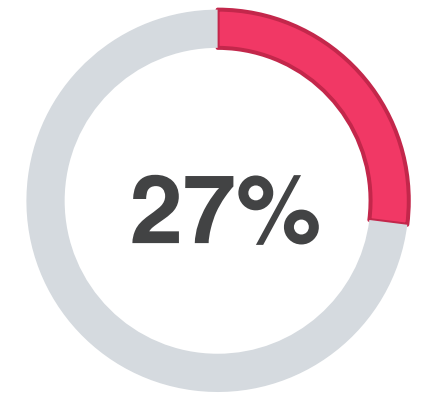
The ability to pay for food & drink with your debit or credit card



Free public Wi-Fi in the vicinity of the bar



Discounts on group orders (e.g. six or more drinks)



Phone charging facilities





While improved food & drink range is key in improving the festival experience for some



28%

A wider selection of drinks (inc. lager, cocktails & wine)

18%

A wider selection of food on offer

Which of the following do you think would most improve your experience at festivals?



Festivals present the ideal opportunity for trialling new drinks



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44%

Of festival-goers stated they have tried a drink they had not tried before when at a festival



No fewer than 1 in 3 across age groups experiment with previously untried drinks at festivals



37% 53% 51% 43%

17-24

25-34

35-44

45+

Proportion of age group stating they have tried a drink they had not before when at a festival

44%

Of festival-goers drink at least one drink category at festivals that they don't usually drink when out in pubs, bars and restaurants





LADs account for a large proportion of category switching



Of consumers who were influenced to drink a category at a festival which they do not typically choose...

48%

Switched to at least one of...

***Mainstream lager / Cider / Premium lager / World lager / Craft beer**



On the whole, these are the dominant festival drinks choices



Thinking about when you visit festivals, which of the following drinks do you typically purchase?

	Cider	39%
	Soft drinks	25%
	Mainstream lager	21%
	Vodka	20%
	Hot drinks	18%
	Premium lager	17%
	Still wine	15%
	Cask ales	15%
	World lagers	14%
	Cocktails	13%

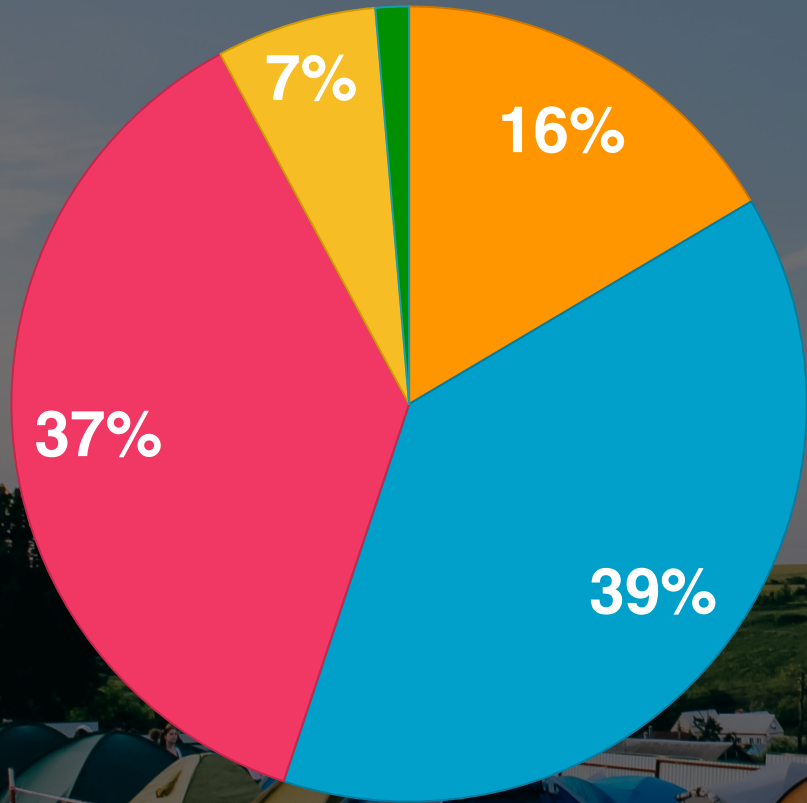
36% of festival-goers typically choose lager

72% of festival-goers typically choose at least one LAD category



Although half of respondents rate the drinks choice as good or excellent, there is room for improvement

- Excellent
- Good
- Ok
- Poor
- Awful



How did you rate the drinks choice at festivals this year?



Given the propensity to try new drinks at festivals, it's essential that expectations of range & quality are met

How did you rate the drinks choice at festivals this year? /

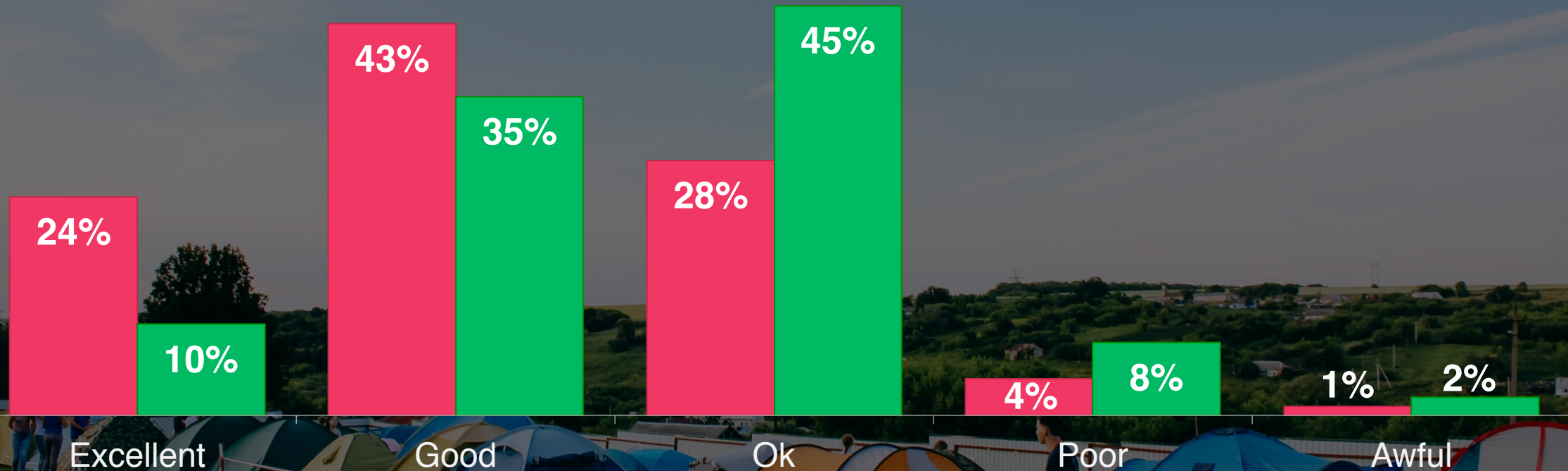
Thinking about when you visit festivals, which of the following drinks do you typically purchase?

	Excellent	Good	Ok	Poor	Awful
Wine	21%	42%	31%	5%	1%
Spirits	21%	40%	33%	5%	1%
LAD	18%	40%	35%	6%	1%
Soft drinks	15%	40%	38%	5%	1%



Perceptions of a poor range may be a blocker of trial

■ Try new drinks at festivals ■ Do not try new drinks at festivals













How did you rate the drinks choice at festivals this year?



Experimentation and switching between cuisine types at festivals is apparent



What kinds of food do you like to eat at festivals?

	Pizza	52%
	Burgers	50%
	Chips & dips	38%
	Sandwiches & wraps	36%
	Mexican	31%
	Fish & chips	30%
	Chicken & chips	29%
	Chinese	28%
	Indian	28%
	Thai	27%



5.7

Average number of different food categories eaten at festivals

Just **7%** of festival-goers choose just one cuisine type at festivals



Festivals better facilitate consumer desire to trial new cuisine types



23%

Choose less than 5 diff food types at festivals

32%

Choose between 6-10 diff food types at festivals

36%

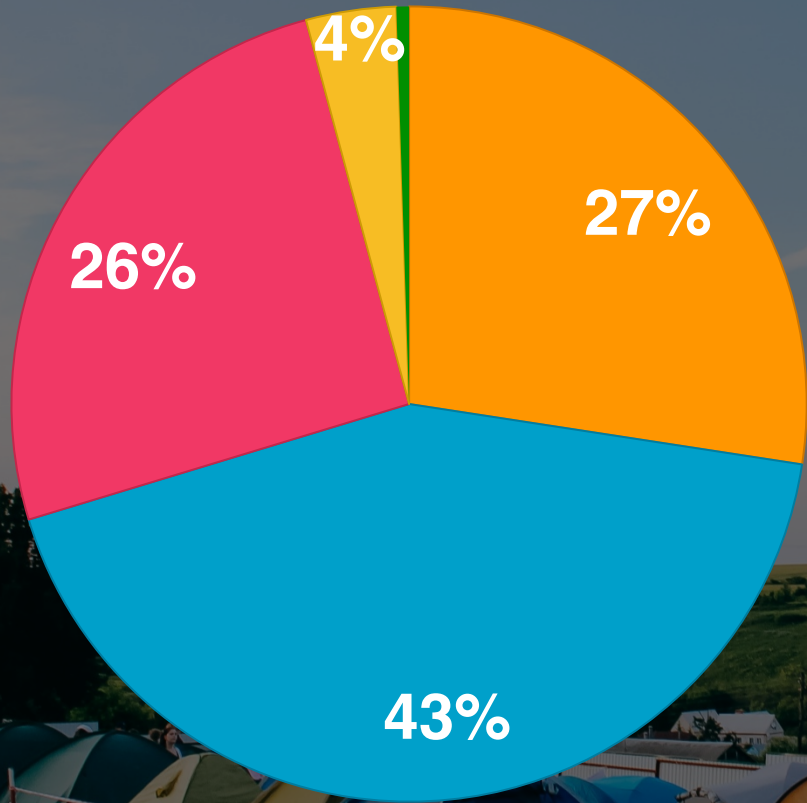
Choose between 11+ diff food types at festivals

Proportion of festival-goers rating food choice as excellent



As reflected in the positive perceptions of food choice, exceeding that of drinks choice

- Excellence
- Good
- Ok
- Poor
- Awful



How did you rate the food choice at festivals this year?



Summary

- The food and drink on offer is an important factor when choosing which festivals to attend, for 61% of festival goers. However, only 55% rate the current drinks choice as good or excellent, with food offer fairing slightly better at 70%.
 - Clear room for improvement, particularly in drinks.
 - Presenting opportunity for festival operators to work more closely with suppliers to deliver against consumer expectations and improve their overall experience.
- With price of food and drink being the 2nd biggest frustration for festival goers, delivering a better range is key to overcoming perception of value for money and driving increased sales with a consumer set for whom value for experience is just as important.
 - Festivals provide a strong opportunity for drinks suppliers to drive trial, as 44% of festival goers purchase drinks they have not tried before, whilst at festivals.
 - Further opportunity to work closer with drinks suppliers for mutual benefit

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