



# Powys Integrated Quality Management Research Project 2006

## Executive Summary: Dyfi Valley



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## Context

The research phase of the Integrated Quality Management (IQM) project took place over a 10 week period between July and September 2006, incorporating visitor surveys, trade surveys and community audits in the Dyfi Valley. Trade surveys were sent out to 200 businesses that had contact with visitors (accommodation providers, attractions and shops) across the Dyfi Valley area, and 31 of them returned questionnaires (15.5% response rate). The settlements that were targeted for visitor surveys were Machynlleth, Aberdyfi, Corris (including the Centre for Alternative Technology) and Dinas Mawddwy, gaining a total of 427 questionnaires. Community Audits were carried out in mid July and again in early September within each settlement, using a standardised form (see full report). This allows a comparable assessment of the settlement at different stages of the season and between years.

This executive summary sets out the key findings obtained from analysis of the survey data. Further detail, comments, graphical and photographic illustration can be found in the full reports.

### Total number of visitor questionnaires for each settlement

Dyfi Valley settlement	No. of questionnaires
Machynlleth	162
Aberdyfi	112
Corris	100
Dinas Mawddwy	53
Total	427

## Visitor Survey

1. The majority of the respondents (36%) were in the 35-44 age range both overall and within each settlement. It is notable that the 45-54 age range only makes up 12% of the respondents to the survey and this gap is strongly evident in both Aberdyfi and Machynlleth. Over a third (35%) of the respondents' accompanying parties was children under 16 years.
2. 38% of respondents were on their first visit to the Dyfi Valley settlement where they were surveyed, thus 62% were on repeat visits. In Machynlleth and Aberdyfi, more respondents were repeating a visit than were visiting for the first time. Within each age range, the balance between first time and repeat visitors was similar, except for 55-64yrs and 65+ years where repeat visitors strongly outweighed first time visitors.
3. The majority of repeat visitors in Corris and Dinas Mawddwy visited the area once a year or less, while 47% of the Machynlleth respondents visited more than 4 times a year. Half (50%) of the Aberdyfi repeat respondents visited the town 2 to 4 times a year.
4. The majority of respondents (62%) were on a holiday of 4 nights or more, and this was the same in each settlement and each age group. The next most

frequent response overall was that visitors were on a day trip of 3 hours or more (15%). This was repeated in each settlement apart from Aberdyfi where next most frequent response was that visitors were on a day trip while on holiday.

5. The home residence of 37% of respondents was the Midlands, while 12% came from the North West England, 12% from London, South and East England, 10% from South West England, and 10% from Wales.
6. The three most frequent types of accommodation used by overnight visitors to the Dyfi Valley were rented self-catering/serviced apartments (22%), rented static caravans (20%) and guest house/ B&B type accommodation (18%). In all the settlements except Corris, the self-catering type was most frequent. In Corris, more visitors were staying in guesthouse/B&Bs or a bunkhouse than in self-catering accommodation.
7. First-time visitors were more likely to be staying in hotel/inn-type, guesthouse/B&B type, self-catering or bunkhouse accommodation. Repeat visitors were more likely to be staying in owned or rented static caravans or touring caravans/motor homes.
8. A large majority of respondents (58%) had booked their accommodation direct with the establishment. Only 12% had not booked accommodation in advance.
9. Fifty five percent of respondents were away from home for 4-7 nights while over a quarter (27%) was away for 8-14 nights.
10. Ninety percent of respondents had reached the settlement on the day of the survey by car/van while 7% had cycled and 6% walked.
11. Respondents were asked to select from a list their one main reason for visiting the area. A previous visit was most frequently cited as the main reason by 17% of respondents. The next most frequent main reasons were diverse, with the beach (10%), activities (10%), scenery (11%) and peace and quiet (9%), an event/festival/sport (10%) and recommendation (11%) all being important.
12. Respondents were asked to select any number of secondary reasons influencing their visit. By a large majority, the scenery and peace and quiet were important for 43% and 44% of the respondents respectively. The beach (16%) and the culture/history (12%) were the next most frequent responses.

The main reasons cited within each settlement were:

- The beach for Aberdyfi (36%) with the next most frequent being a previous visit (21%).
- Shopping for Machynlleth (24%) with a previous visit (18%) and recommendation (16%) also important.
- Scenery for 53% of visitors to Dinas Mawddwy, and also peace and quiet (24%) and a previous visit (27%).
- For Corris an event/festival/sporting event and activities (both 26%).

13. When asked how much previous knowledge they had of the settlement, respondents within each settlement showed a diverse response. In Machynlleth, the majority of visitors felt they knew quite a lot (29% of respondents) or most things (22%), while in Aberdyfi a strong majority only knew a little about the settlement (43%). In Corris, the majority knew 'not very much' (33%) or very little (30%), and in Dinas Mawddwy the majority were almost split between not knowing very much (32%) and knowing quite a lot (30%).
14. When asked where they sourced information, the majority of respondents had not obtained information either before (49% of respondents) or during (32%) their visit.
15. The most frequently used source of information **before** the visit was the internet for 26% of respondents (109 people), followed by word of mouth (7%). First time visitors were more likely to research on the internet than repeat visitors.
16. The most frequently used source of information **during** the visit was the Tourist Information Centre (TIC) in the town, for 50% of respondents. First time and repeat visitors used the TIC almost equally.
17. Respondents were asked to select the types of 'attraction' they would be visiting while in the area. The most frequent response was sightseeing (65%) but nearly half was planning on going to a visitor attraction (47%) or shopping (47%) and also popular was visiting a pub or restaurant (42%).
18. Respondents were also asked what activities they planned to undertake while in the area. Walking was the most frequent activity, both overall where it was undertaken by 44% of respondents, and in each settlement. Cycling and mountain-biking was the next most frequently chosen activity in the Dyfi Valley for 22% of respondents, and was also the next most frequent for Aberdyfi and Corris respondents. Other popular activities undertaken across the Dyfi Valley included swimming (12%) and fishing (7%).
19. Visitors were asked if they would recommend a visit to the area, and an overwhelming 83% said they would, while the remainder said they possibly would. 63% of respondents found the area as they expected but for 9% it exceeded their expectations.
20. Respondents were able to comment in separate questions on why their visit was better or worse than they expected, and what improvement they would like to see. The responses were written down as people expressed them and are included in the full report. Here they are summarised and broadly grouped together.
  - **Better or worse than expected overall:** generally positive comments on the scenery, friendliness and heritage.

- **Machynlleth:** cycling – more routes especially towards Aberdyfi; take down Celtica signs; clearer signage; more entertainment for children; traffic through-flow; dog dirt; free toilets; more parking.
- **Aberdyfi:** more toilets; bicycle racks; better parking/roads.
- **Corris:** more variety in eating places; more cycle paths; better public transport/signage.
- **Dinas Mawddwy:** better footpath/road signs; later attraction opening.

**21.** Respondents were asked to rate their satisfaction with a variety of aspects of the settlement where relevant, on a 5 point scale.

- The feeling of welcome, friendliness, general atmosphere and overall quality of the visit were rated as excellent by a large majority.
- Availability and cleanliness of public toilets, street cleanliness and parking facilities were rated as good by the majority.
- Pedestrian and road signage was closely rated between good and excellent.
- The quality and amount of information was rated as good.
- The range of eating places, range of shops, quality of local food, quality of accommodation and quality of service were rated as excellent most frequently.
- The range of attractions and activities, quality of events and value for money were rated closely between good and excellent.
- The countryside and scenery was considered excellent by almost all the respondents.

## **Trade Survey**

**22.** The 31 responding businesses in the Dyfi Valley area supported 77 full time jobs and 117 part time jobs, including owners and family members.

**23.** The most frequent method used by the businesses for marketing was word of mouth (22 respondents). Websites were the next most frequently used methods, with 13 businesses maintaining their own websites, and 14 using commercial websites for which they paid a fee. The TIC was used by 12 respondents.

**24.** Where specific markets were targeted, these were likely to be visitors with interests in the environment and outdoor activities.

**25.** Twenty three respondents offered visitors packs/racks of leaflets and displayed leaflets from other businesses and over 90% (27 respondents) informed visitors about events and festivals going on in the area.

**26.** When asked about their perception of change in the area, a frequent response was that there was more use of the Welsh language (10 respondents). The

perception of whether it was busier or quieter was almost the same, with 11 businesses finding it busier and 10 finding it quieter.

27. Businesses rated their satisfaction with aspects of the area on a 4-point scale. The results were quite positive with most businesses being 'satisfied' with cleanliness, footpaths, information provision, eating places, pubs, toilets, shops, road signage and locally sourced products. The bus service was most frequently deemed 'poor' or 'inadequate'. The only aspect with which businesses were 'very satisfied' was the green space.
28. Businesses commented widely on improvements that might benefit visitors and the community. Common themes were better public transport, parking and more evening police presence.

### Community Audits

29. The settlements were audited by the researcher, and additionally on some occasions, the tourism officer and other members of the community.

Settlement	July audit	September audit
Aberdyfi	12 <sup>th</sup> July	6 <sup>th</sup> Sept
Corris	12 <sup>th</sup> July	6 <sup>th</sup> Sept
Dinas Mawddwy	17 <sup>th</sup> July	1 <sup>st</sup> Sept
Machynlleth	Early July	6 <sup>th</sup> Sept

30. As expected, Aberdyfi and Machynlleth were far more 'ready' for visitors though the charm of the other two communities could be their unspoilt, unchanged appearance. However, several small improvements could quite easily be made to improve the general impression.
31. In general, communities could make more of their signs, with flowers etc, and with rationalising signs. Signs need regular cleaning and finger posts updating.
32. Communities were generally clean, but some issues with public conveniences and dog mess and bins.
33. Generally orientation information was patchy and uneven across communities. Often there was little information/welcome available in more than one or two languages.
34. Public transport service was variable, with Aberdyfi and Machynlleth particularly well-served and Dinas Mawddwy suffering paucity. All the communities could make more use of the public transport information that is available.
35. Overall, communities do look tidy and interesting, but are variable in the extent to which they seem to welcome or appeal to visitors.