

# Powys Integrated Quality Management Research Project 2006 Business Survey: The Dyfi Valley



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## **Introduction**

The trade survey was posted out to 200 businesses that had contact with visitors (including accommodation, attractions and shops) in the Dyfi Valley in July 2006. The settlements targeted were Machynlleth, Aberdyfi, Corris and Dinas Mawddwy but all nearby businesses that had some interaction with visitors were included. There were 31 respondents, with 19 businesses from Machynlleth and 4 respectively from Aberdyfi, Corris and Dinas Mawddwy. This gives a response rate of 15.5%. This is a lower response rate than the target (which was 25%) and it is recommended that the results are used for information and guidance rather than strategic purposes.

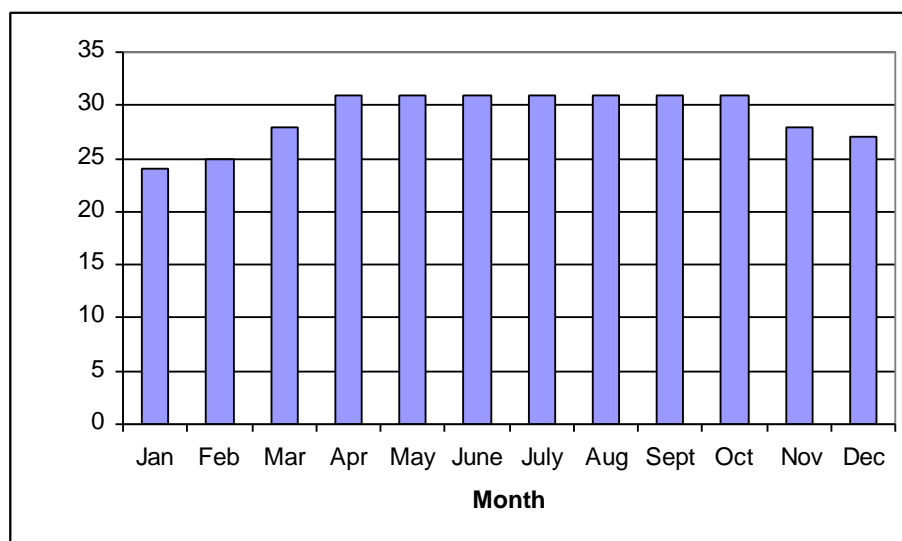
Because of the small sample size, the results are reported as 'frequency' (number of respondents) rather than percentages and generally not divided into the individual settlements.

When reading the results one needs to consider that 5 of these businesses were primarily visitor attractions/food providers, 14 were accommodation providers of various sorts, and 11 were shops. Respondents could leave out any questions that were not applicable to their business or that they did not wish to answer.

## 1. Business activity

Respondents were asked to indicate which months they were open for trade. All the businesses were open between April and October. The months least likely for businesses to be trading are January and February.

**Months open for trading**



Respondents were asked how many people worked in their business, including themselves and their family members. The majority had less than 3 people working either part time or full time. The 31 businesses supported 77 full time jobs and 117 part time jobs between them.

**Number of businesses supporting full time and part time jobs**

Number of people	Full time	Part time
<3	19	15
3 to 5	2	4
>5	3	3
Total	24	22

## 2. Business development

Respondents were asked whether they or their staff had undertaken any development training relevant to their businesses in the last two years. Thirteen businesses (42%) had taken training courses while 18 had not, and a common format was workshops, seminars and familiarisation visits.

Type of training	Frequency
Familiarisation visits	4
Distance learning	1
Workshops/seminars	7
NVQs	1
College/University	0
Other	7
Total	20

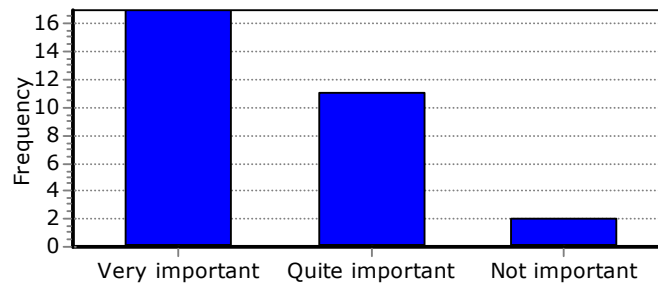
Respondents were asked what they felt were the main obstacles facing their businesses. Their comments are written below as they appeared on the survey form. Recurring themes are red tape, seasonality of visitor numbers and rising costs.

### Perceived obstacles to business development

Lack of public transport.
Mid Wales is poorly marketed. Wonderful scenery to coast - very few know it.
Lack of tourism during the winter months.
Revenue funding.
Meeting people's demands.
Lack of customers, depends on visitors.
Bigger shops are selling for less.
Declining over-the-counter trade, fuel costs, endless red tape illiteracy.
Too much road works, high rate of council tax.
Unfair trading, over regulated, too much paper work.
Bureaucracy - all the new, very often stupid regulations coming from the EU; this government.
Getting staff for the busiest period.
Not enough government help for small businesses.
Price of fuel.
Lack of visitor attractions.
Lack of winter visitors, cost of marketing, no help from official bodies for this.
Rising prices and business costs e.g. rates cheap imports, utilities.
Targeting correct form of advertising for market, drawing attention to ourselves.
Increasing costs e.g. council tax, energy costs.
Planning regulations, high costs of energy, the new local tourism tax if it is implemented.
Fluctuation in the numbers of visitors in the area depending on the time of year. Transport - too many cars for the car park in peak season, better public transport services would allow us to cater for more visitors. Visitors demand innovation year on year so investment needs to be continuous.
Lack of grants to develop the business, the length of time it takes to turn over applications.

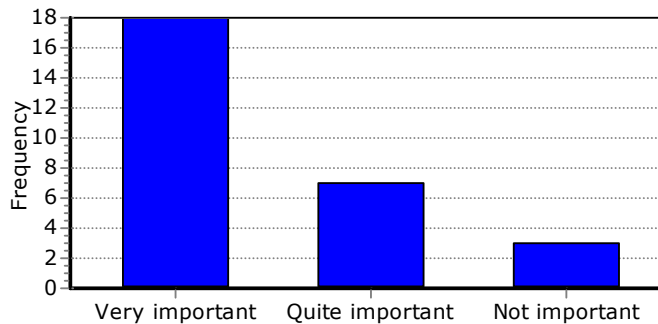
Respondents were asked how important improving environmental performance was to their business. To more than half (57%) it was very important, and to approximately 94% of the respondents, it was very or quite important. Fourteen businesses indicated that they would like more information about Arena Network's 'Green Dragon' environmental management system.

### Importance of improving the business' environmental performance



Businesses were also asked how important they felt it was to offer local products (using food as an example) to their visitors. To 89% of respondents it was felt to be 'very' or 'quite important', and 18 businesses requested more information on where to source local products.

### Importance of offering local products



## 3. Marketing and information provision

Respondents were asked to indicate from a list their main methods of marketing. Multiple answers were accepted. As with both the Llanidloes and Llandrindod Wells' surveys, word of mouth was the most frequently chosen method (22 respondents). Websites were also a frequent option, with 14 businesses using commercial websites and 13 businesses managing their own website.

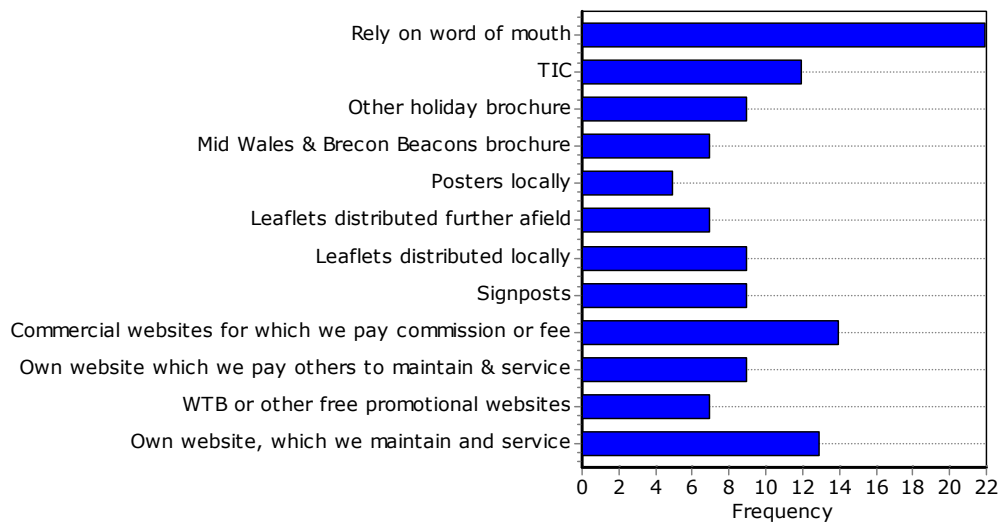
An indication of business use of the internet is that 16 businesses provided email addresses on the survey forms and 15 gave their website addresses.

Twelve businesses used the Tourist Information Centre (TIC) for marketing. Two businesses indicated that they used the TIC bed booking service, and 5 took leaflets and posters in for display there.

Of those that used leaflets for marketing their businesses, all 4 respondents distributed them themselves and nobody used a commercial distributor.

A total of 23 respondents indicated that they offered their visitors packs or racks of leaflets, and the same number displayed leaflets from other businesses. Over 90% (27 businesses) informed their visitors about events and festivals going on in the area.

### Main methods used for marketing businesses



### Other magazines/brochures/newspapers used for marketing

Clean Slate, Eceat
In news papers - Cambrian News
Art and design publications
Cambrian News, County Times
Aberdyfi brochure
Visit Britain and Powys C.C.
Good non-retirement guide, Kids Days Out, Good Gardens Guide, Eryri Snowdonia guide, Green directory, Cambrian holiday maker
Stay on a Farm
Magazines and books
Veggie and animal-friendly publications

Some respondents indicated the specific markets they targeted and those they were planning on targeting in the future. In a similar vein to Llanidloes and Llandrindod Wells surveys<sup>1</sup>, visitors that undertook outdoor activities featured strongly, but there was also an inclination for green interests.

### Specific markets targeted

Environmental - green interests, spiritual
Environmentally friendly C.A.T. visitors, veggies and vegans. public transport users, walkers, cyclists, motorcyclists, bird & nature lovers
Target shops
Local and tourists
Won a number of national awards - has broadened our customer base
Golf, walking, gardening, disabled access
Attract fine art and design jewellery and ceramic enthusiasts
Ramblers
Group travel, educational market
Walkers, families
Self-build enthusiasts, gardeners, environmentalists
Walkers, golfers, bird watchers, family, elderly and young people
Environmental, vegetarian, walking

### Future target markets

Environmental - green interests, spiritual
Guests interested in saving the environment and eating veggie local organic food
Golf, walking, cycling
Golf walking, gardening, disabled access
Any suitable e.g. golf, fishing
Walking, spiritual market, green
Walking, mountain biking
People interested in professional and leisure courses
Walkers, people looking for tranquillity

Businesses were asked how they thought visitors spent their time in the area. Common themes were walking, the beach and visiting attractions.

<sup>1</sup> Powys Integrated Quality Management Research Project 2006, Llandrindod Wells and Llanidloes reports, Institute of Rural Sciences, UWA 2006.

### Businesses perception of how visitors spend their time

Walking, seaside, castles, C.A.T, local tourist attractions
Beach, country walks, gardens
Visiting C.A.T
Walking, cycling, diving, shopping
Don't know
Walking, staying in caravans and holiday cottages
Sightseeing, shooting, walking, visit family
Visit C.A.T, walking, cycling
Beach, Talylyn railway, shops
In a caravan, some cycling through, others staying in town
Visiting their holiday cottages, eating out, visiting other galleries, mountain biking, a lot live here
Walking, cycling, bird watching
Walking, sightseeing
Golf, sailing, beach, walking, fishing
Depends in weather - beach during summer
Golf, fishing, walking, C.A.T, Aberdyfi
Visiting local attractions, walking, beach
Mostly walking, spending time away from it all
You name it they do it
Walking, visiting attractions
Don't know, would like to know
Doing all sorts of things
C.A.T., walking, seaside

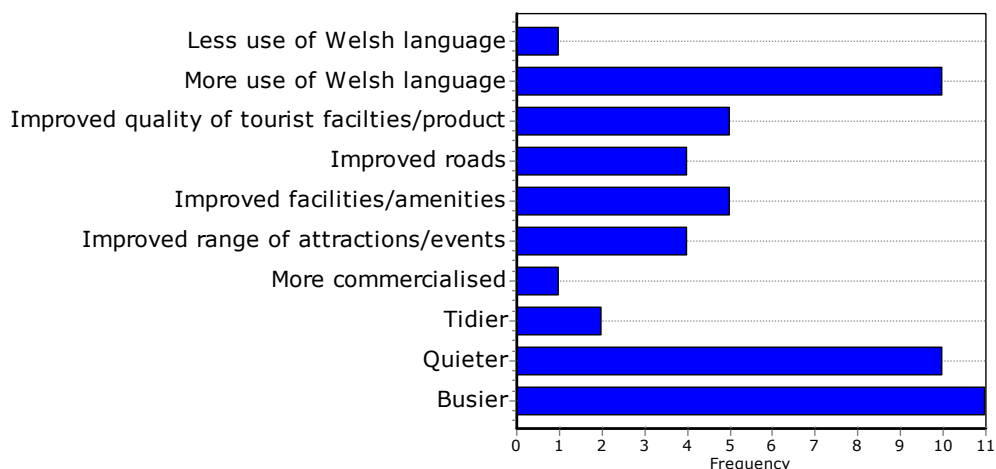
Respondents were asked if they felt that they or their staff would benefit from opportunities to become more familiar with what the area has to offer visitors. Half the respondents (13) felt this would be useful while the other 13 did not feel they would benefit.

Businesses were also asked if they surveyed their visitors in any formal way, with for example suggestion boxes or comment forms. Ten indicated that they did, while 20 did not, though 5 of the latter felt they would be interested in doing so. Fourteen businesses also said they would be interested in helping the local authority compile tourism statistics.

#### 4. Perception of change

Businesses were asked to indicate from a list what changes they had noticed in the last two years. Multiple answers were permitted. It is interesting to note that the perception of whether the area was busier or quieter with visitors was not definitive. There was also a strong response to more use of the Welsh language.

**Perceived changes**



These changes were examined in more detail for each settlement (for this question there were 3 respondents from Corris and Aberdyfi, 4 from Dinas Mawddwy and 16 from Machynlleth). Respondents from Dinas Mawddwy particularly seemed to note positive changes. In Machynlleth the greater perception was that the area was quieter.

**Changes perceived by businesses in each settlement**

Changes	Machynlleth	Aberdyfi	Corris	Dinas Mawddwy
Busier	6	1	1	3
Quieter	9	0	1	0
Tidier	1	1	0	0
More commercialised	0	0	0	1
Improved range of attractions/events	1	1	0	2
Improved facilities/amenities	3	0	0	2
Improved roads	2	0	0	2
Improved quality of tourist facilities/product	2	2	0	1
More use of Welsh language	7	2	1	0
Less use of Welsh language	1	0	0	0

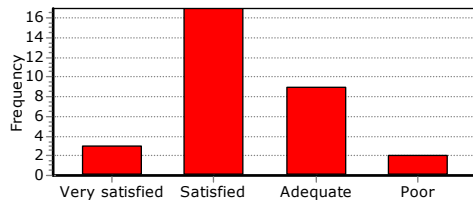
## 5. Business satisfaction with facilities and services

For tourism to be used as a successful tool in community development, it is vital that both businesses and residents within those communities are satisfied with the facilities and services available to them on a local level. Respondents were asked to rate a list of facilities and services on a 4 point scale from 'very satisfied' to 'poor'.

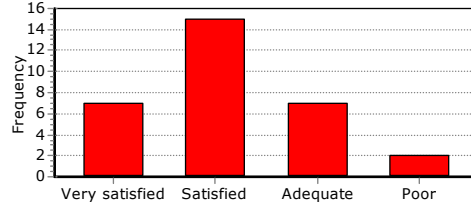
The results were positive, with most businesses being 'satisfied' with all but the bus service, which was deemed 'poor' or 'inadequate'. Rated most as 'very satisfied' was the green space.

### Business satisfaction with local services and facilities 2006

#### Cleanliness



#### Eating places



#### Information about events etc.



#### Locally sourced products



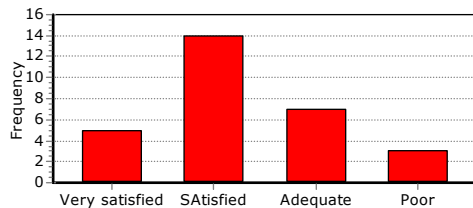
#### Public toilets



#### Pubs



#### Road signage

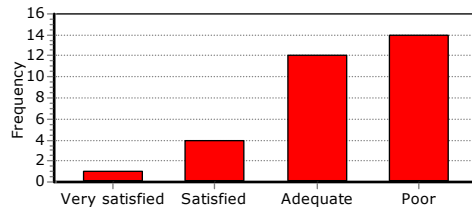


#### Range of shops



## Business satisfaction with local services and facilities 2006

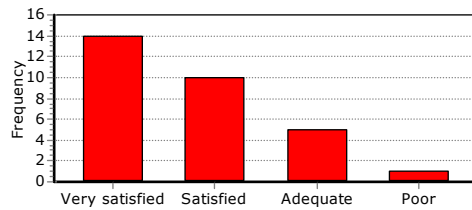
### Bus service



### Footpaths



### Green space



## 6. Suggested improvements in facilities and services

Businesses were asked to comment on what improvements could be made for visitors to the area and also what improvements would benefit the community. Often improvements in a settlement can be beneficial to residents, businesses and visitors and consequently respondents sometimes put the same comments into both answer spaces. Where this occurred, one was deleted for the sake of clarity.

Common themes were better public transport, parking, more evening police presence and re-development of the Celtica site.

### **Business suggestions for improvements that could benefit visitors**

Clearance and opening of public footpaths; better public transport to villages.
Machynlleth still virtually closes Thursday to Sunday evening, the main season and months in the low season. Little signing for local amenities to places of interest.
Improved planning consents to allow holiday parks to expand thus attracting more visitors.
Cleaner town and approach to town, more tourism signposts, better cleaner trains and more coaches. Better communication with other tourism businesses in the area. The bad B&Bs should be closed down; guests who stay in these never come back to the area. Approach to centre for alternative technology smartened up, tarmac car parks and whole reception area given a bright coat of environmentally friendly paint. Official sign posts to direct guests to B&B and guest houses.
The area is lacking in good quality seasonally priced rooms for families in hotels.
Better advertising, encourage people to shop locally.
More development of local history and Welsh events.
More interesting shops.
More parking, better policing, reduced fuel costs (tax) traffic lights at town clock.
Promote more exiting activities during summer because only time we can have visitors. Encourage them to stay longer, stop road works and any type of building that obstruct summer time.
More up to date information in TICs, especially on disabled access.
Free parking in the main car park.
Free parking in the winter, free public toilets, better eating places - which stay open after 3.30 pm - stop half day closing.
More parking spaces in summer months.
Cheaper car parks, free for first two hours.
Focus on quality.
More police presence to deter rowdiness at night, shops, cafes open in winter.
More eating places at night, signs to show our B&B.
Our visitors are pretty self sufficient so not much really.
Joint marketing website for village amenities.
Better public transport.
Take down Celtica signs - the place has closed. Arrange something to be there that will benefit visitors and local people.
A shuttle bus travelling from main holiday accommodation to the various attractions, beaches and town centres; more frequent and reliable public transport into the area; trains with ample bicycle storage, buses with in-bus bicycle storage, more cycle tracks; nice but less expensive places to eat out; more brown signs to point at CAT.
Cleaner toilets; let one company combine the tourism development for the area.
Better bus services, co-ordinating bus and train, getting info on buses more easily, up to date time tables on bus stops.

### Business suggestions for improvements that could benefit the community

Clearance and opening of public footpaths, better public transport to villages, more effective polices for the protection of biodiversity and wildlife habitats.
Much greater pro-active marketing to realisation that tourism is a major source of revenue for this area.
Improved planning consents to allow holiday parks to expand thus attracting more visitors.
A new community hall and clean 24 hour toilets built. Tearooms which stay open until 6pm. Machynlleth clock cleaned up with public funding, lottery funding and completely repaired. Plas reopened and used to promote this area and attract tourists to stay longer in the area. Plas restaurant to be open all day and serve good evening meals. Arrowed and signed walk around Wilfa completely overgrown with ferns and foliage - Powys county council not clearing paths.
More attractions in town.
To stop the young racers in town who are out every evening in summer before they kill someone, the police don't seem to do anything. Lots of people complain about them.
More competitions to the bigger shops so we can have competitive prices.
More parking; better policing; reduced fuel costs (tax); traffic lights at town clock; clamp down on anti social conduct; sack chief constable.
Tourist shops should display local community products that are produced locally. Encourage tourists to look around more than just pass through.
Minibuses instead of double-deckers and coaches. More room on trains and more trains on time.
Presence of the police at pub closing time.
Better choice and standard of eating places, better public transport, half-day closing to be stopped.
Improve local police presence, especially weekend around midnight.
More police presence to deter rowdiness at night.
Better road, bins by our entrance.
Changing Plas into locally run community based affair, cinema restaurant, office space.
Better public transport.
Cinema, theatre, ten pin bowling.
More frequent and reliable public transport; affordable housing to buy in keeping with local wages to help with staff retention. Ditto national health dentist, broadband and digital network for businesses in remote areas; better flood warning facilities or flood defences.
Better public transport.