

Powys Integrated Quality Management Research Project 2006

Visitor Survey: The Dyfi Valley



REPORT AUTHORS:
D. Hardy & R Wornell
Institute of Rural Sciences
University of Wales
Aberystwyth
Ceredigion
SY23 3AL

☎ 01970 624471

Contents

1. Introduction	4
2. Visitor profile	4
3. Overnight visitors	10
4. Visitor behaviour	14
5. Information sources	18
6. Visitor activity	22
7. Visitor satisfaction	25

1. Introduction

Visitor surveys took place over a 10 week period between mid July and early September 2006 in the settlements of Machynlleth, Aberdyfi, Corris and Dinas Mawddwy and surrounding areas. A total of 427 questionnaires were collected, mostly through face-to-face interviews but also supplemented with some self-completed forms (in holiday accommodation). Surveying took place both during the week and at weekends, as part of a wider programme of visitor surveying that also included Llanidloes and Llandrindod Wells. Some of the surveying was deliberately timed to coincide with events (e.g. Machynlleth market) or took place at visitor attractions in order to make efficient use of the available time and effort. For example, one days (5 hours) surveying took place at the Centre for Alternative Technology and this was included in the Corris tally. Overall, approximately 63% of the surveys were taken on the street, 33% at attractions and 4% at events.

Respondents did not have to answer all the questions if they chose not to. In this report, 'adjusted percentages' are generally used which describe the percentage of respondents to that question, rather than the percentage of the total survey respondents. This is also the reason why the 'base' totals differ for each graph. When the data is examined for each settlement, the adjusted percentage is the percentage of respondents from each settlement. 'Frequency' refers to the number of respondents.

This report regards the Dyfi Valley as one area because of the small sample size for each settlement, though it distinguishes between towns where appropriate. The settlements all have very different characteristics; Aberdyfi is a coastal resort, while Machynlleth is a market town and hub for outdoor and environmental activities. Both Corris and Dinas Mawddwy are inland villages on tourist routes and with tourist attractions.

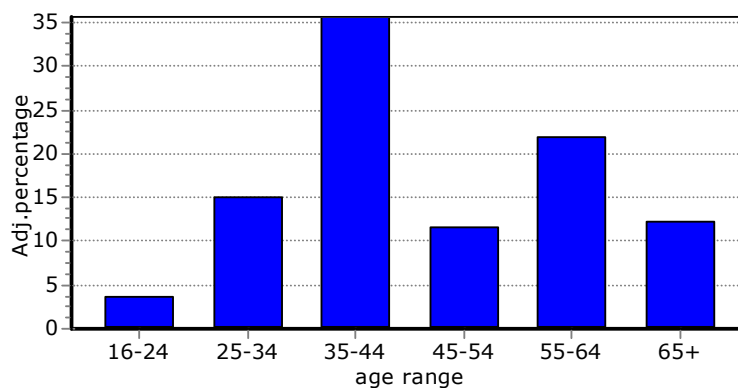
Total number of visitor questionnaires for each settlement

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

2. Visitor profile

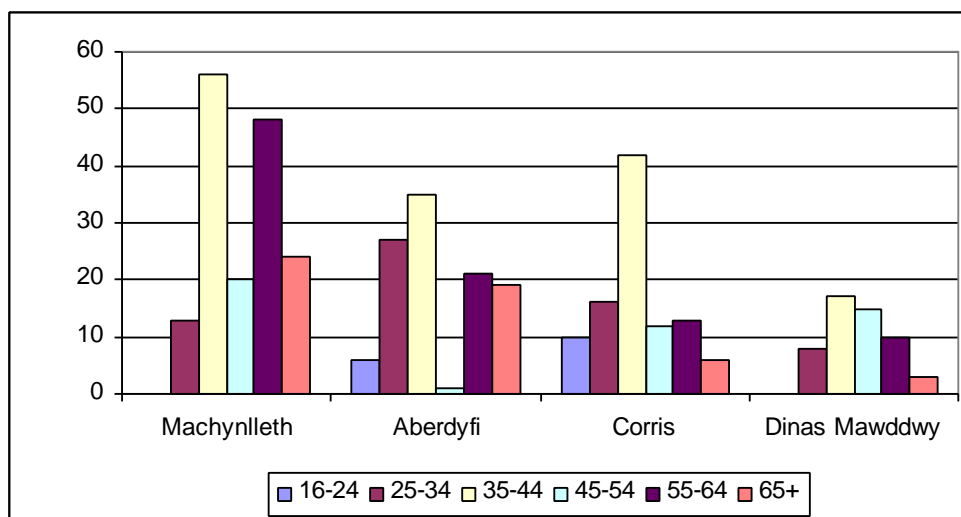
A profile of the survey respondents shows that 47% were male and 53% were female. The majority (36%) were in the 35 to 44 age range. It is interesting to note that visitors in the 45 to 54 age range only make up 12% of the respondents.

Age profile of all the respondents



When the age profile of the respondents is examined in more detail, it can be seen that the most frequent age range for each settlement is still the 35 to 44 year olds. Both Aberdyfi and Machynlleth strongly lack respondents to the survey in the 45 to 54 age range. There are also no respondents from Machynlleth or Dinas Mawddwy in the 16-24 age range.

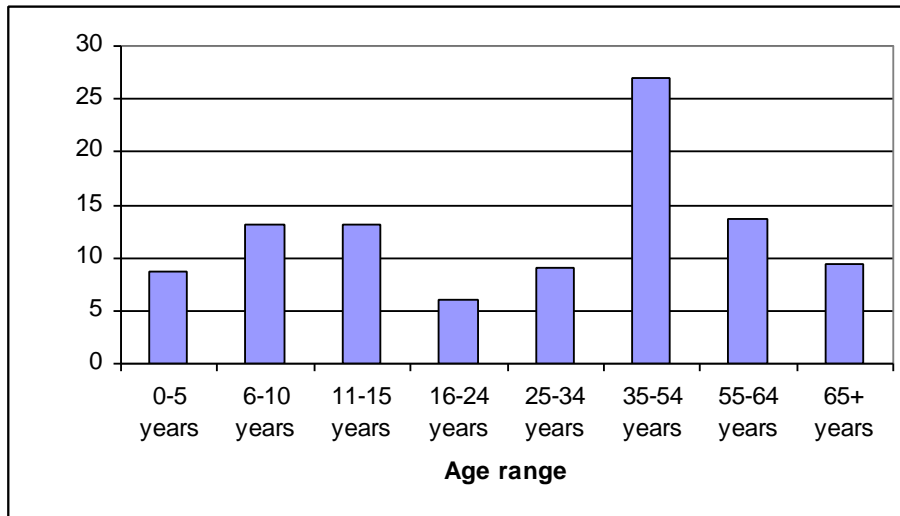
Visitor age range for each settlement



The age profile of the party with the respondents also indicates that the majority (27%) were in the 35 to 54 age range. It also shows that more than a third of the parties (340 equating to 35%) were children under the age of 16. This is substantially more than Llanidloes (19%) or Llandrindod Wells (21%)¹.

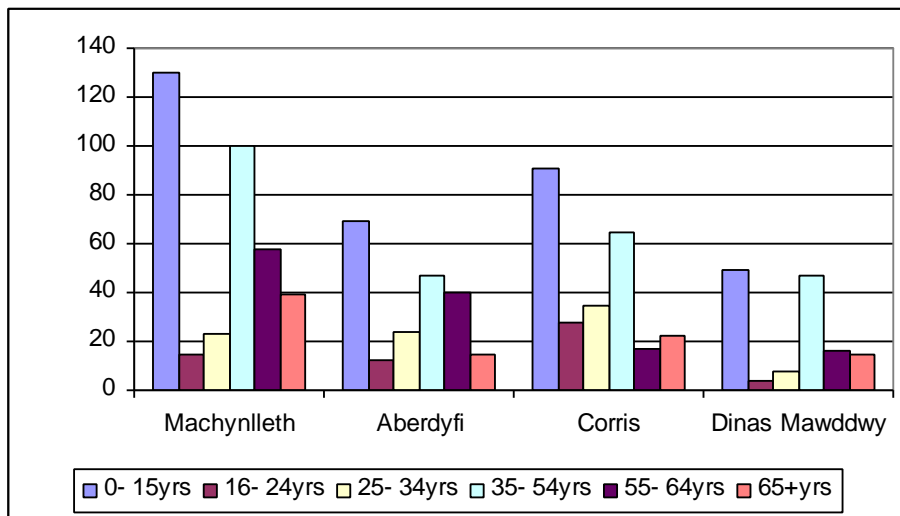
¹ All statistics quoted concerning Llandrindod Wells or Llanidloes are taken from the Powys Integrated Quality Management Research Project Reports 2006, (Institute of Rural Sciences, University of Wales, Aberystwyth 2006) for those respective towns.

Age profile of respondents' party



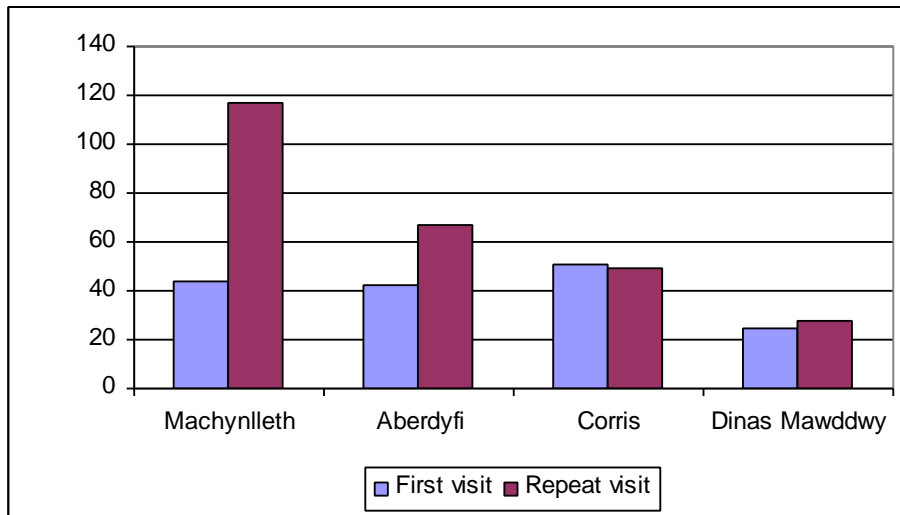
When the settlements are looked at individually, it shows that children under 16 years make up a large proportion in each area.

Age range of party with the respondents in each settlement



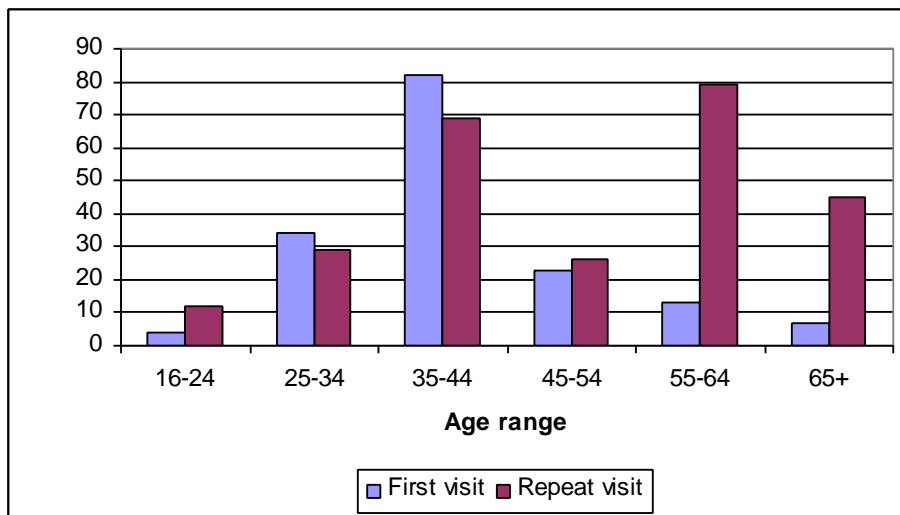
Of the respondents, 38% were on their first visit to the Dyfi Valley settlement, while 62% were on repeat visits. In Machynlleth and Aberdyfi, more people were repeating a visit than were visiting for the first time. In Corris and Dinas Mawddwy the balance was much closer.

Number of respondents on a first or repeat visit to the town



When the respondent's age range is examined with whether they were first time or repeat visitors, it can be seen that the 55 to 64 years and the 65+ age range are largely repeat visitors with very few first time visitors. The other age ranges are far more balanced.

First or repeat visit and age range

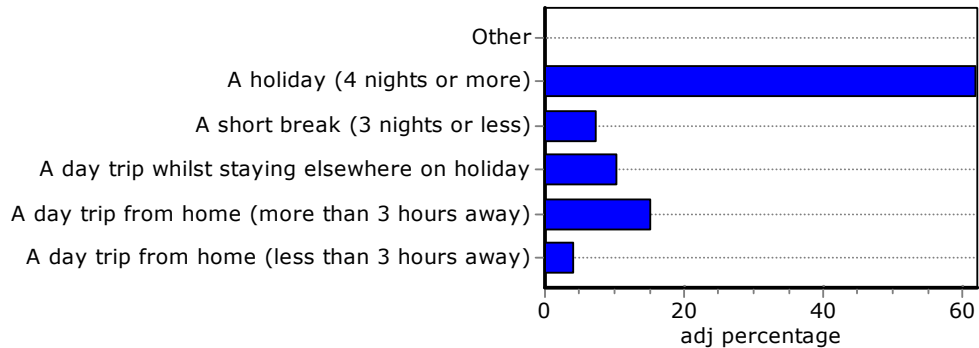


Visitors were asked about the duration of their visit. Overall, the majority (62%) were on a holiday of 4 nights or more, and this is also evident in each settlement. The next most frequent response overall was a day trip of more than 3 hours (15%).

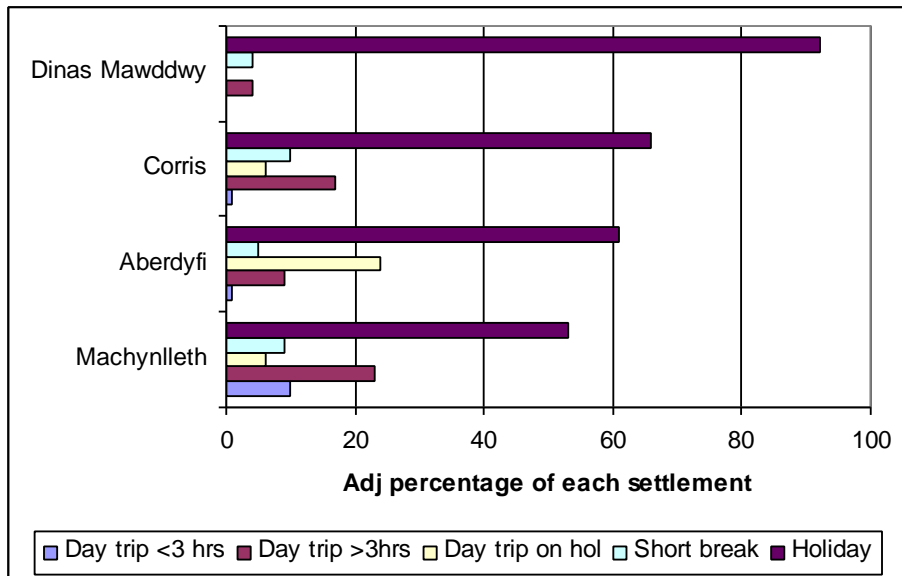
It is interesting to note the balance between day trips of less than 3 hours and those of more than 3 hours. In each settlement, a substantially higher percentage of the visitors

were on a day trip of more than 3 hours. In Aberdyfi, the next most frequent response was a day trip while on holiday. In Dinas Mawddwy, none of the respondents were on a day trip while on holiday, or a day trip of less than 3 hours.

Duration of visit in the Dyfi Valley

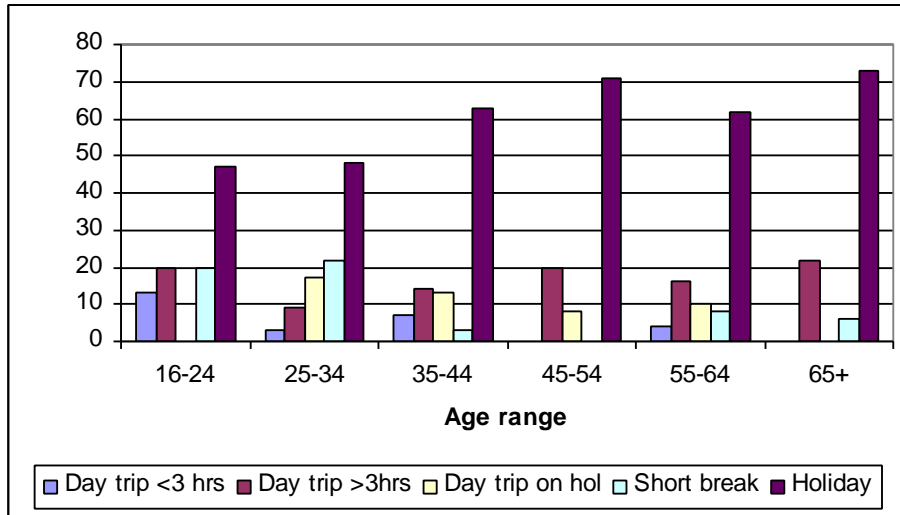


Duration of visit for respondents in each settlement



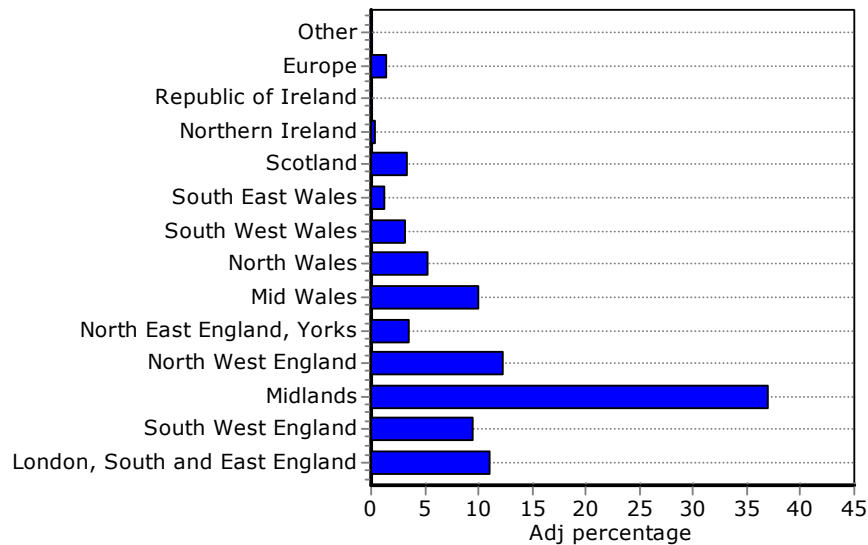
An examination of the age range of respondents and the type of visit they are on indicates that holidays of longer than 4 nights are the most frequent in each age range. The next most frequent for the age ranges of 35 years upwards was a day trip of longer than 3 hours. The age ranges most frequently taking short breaks were the 25-34 and 16-24 year olds.

Age range and type of visit for the Dyfi Valley area



Respondents were asked in which area their home was, and it was clear that the majority (37%) were from the Midlands. Other regions with frequent responses were the North West of England (12%), London, the South and East (12%), South West England (10%) and Mid Wales (10%).

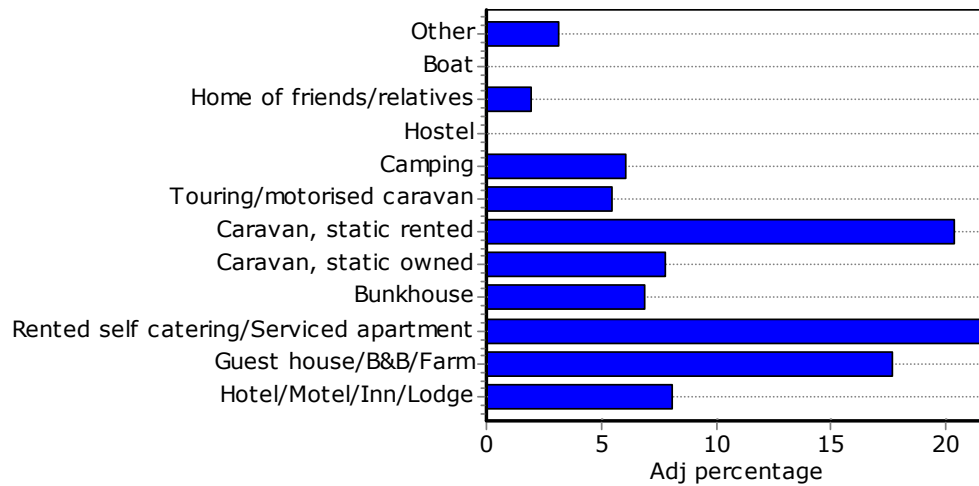
Area of residence



3. Overnight visitors

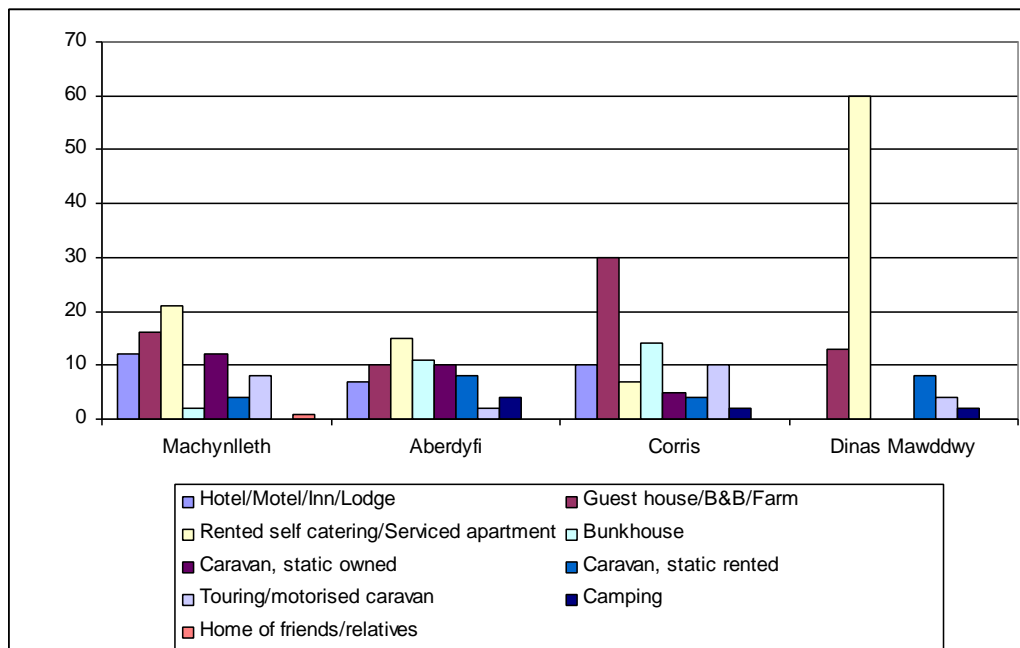
The three most frequent types of accommodation used by overnight visitors to the Dyfi Valley were rented self-catering/serviced apartments (22%), rented static caravans (20%) and guest house/ B&B type accommodation (18%).

Visitor accommodation type



When the accommodation type is examined for each settlement, the self-catering option is the most frequent response in all except Corris, where more visitors were staying in guesthouse/B&Bs or a bunkhouse than in self-catering.

Visitor accommodation type from each settlement



The 'other' option when described included log cabins (9 respondents) and owned holiday cottages (4 respondents).

Number of visitors using each accommodation type

	Machynlleth		Aberdyfi		Corris		Dinas Mawddwy	
	Freq.	Adj. %	Freq	Adj. %	Freq	Adj. %	Freq	Adj. %
Hotel/Motel/Inn/Lodge	13	12	7	7	8	10	0	0
Guest house/B&B/Farm	17	16	10	10	24	30	7	13
Rented self-catering /serviced apartment	22	21	15	15	6	7	32	60
Bunkhouse	2	2	11	11	11	14	0	0
Caravan, static owned	13	12	10	10	4	5	0	0
Caravan, static rented	21	20	31	31	11	14	7	13
Touring/motorised caravan	4	4	8	8	3	4	4	8
Camping	9	8	2	2	8	10	2	4
Home of friends/relatives	0	0	4	4	2	2	1	2
Other	6	6	1	1	4	5	0	0
Total	107	101	99	99	81	101	53	100

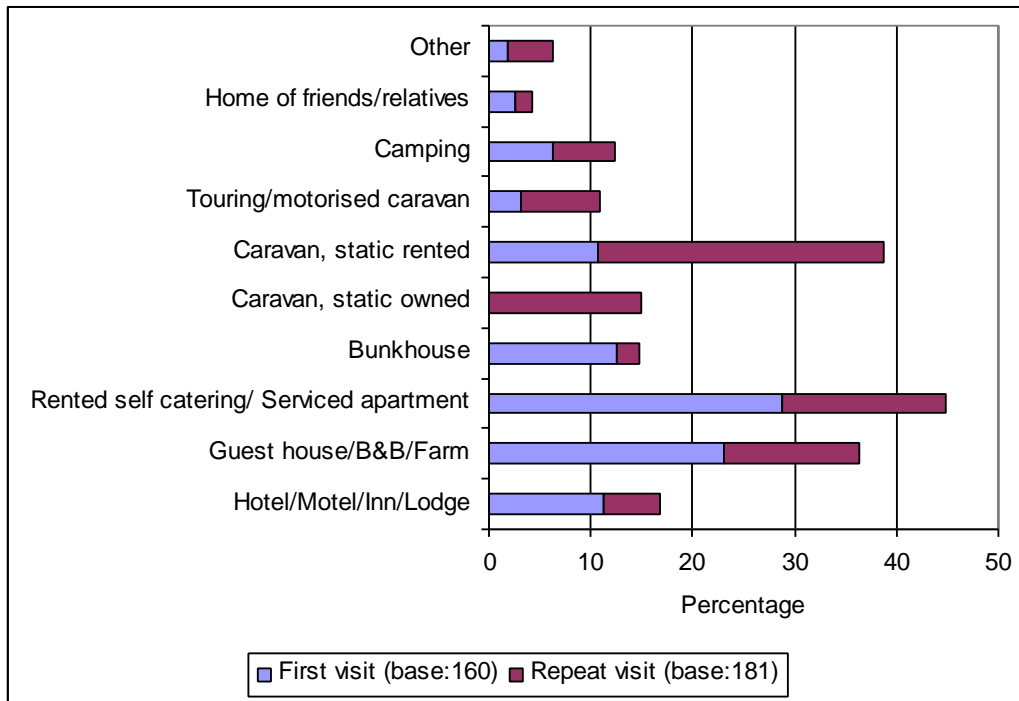
Total adjusted percentages may total to over 100 owing to rounding

The accommodation type was examined for first time and repeat visitors. 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.

Accommodation type for first time or repeat visitors

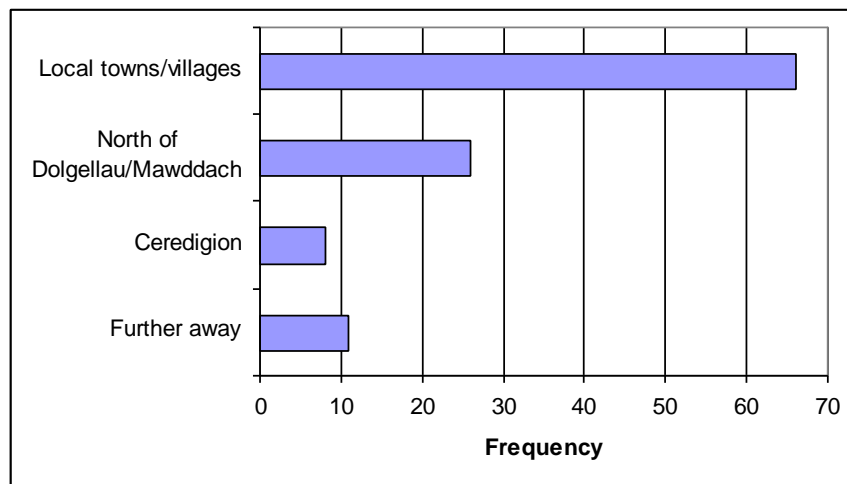
	First visit frequency	Repeat visit frequency
Hotel/Motel/Inn/Lodge	18	10
Guest house/B&B/Farm	37	24
Rented self catering/ Serviced apartment	46	29
Bunkhouse	20	4
Caravan, static owned	0	27
Caravan, static rented	17	51
Touring/motorised caravan	5	14
Camping	10	11
Home of friends/relatives	4	3
Other	3	8

Percentage of first time visitors or repeat visitors using each accommodation type



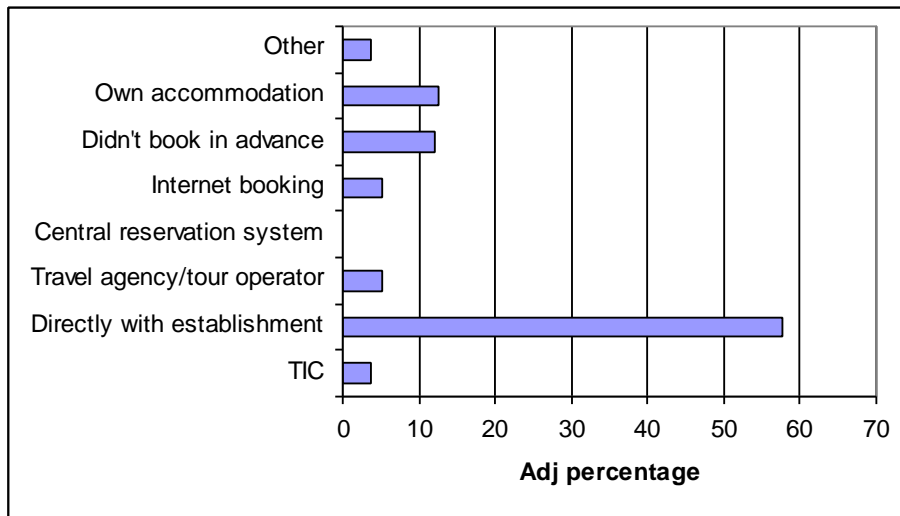
Visitors were asked if they were staying in or very near the settlement where they were surveyed and 67% said they were. Of those not staying close by, 66 were located in nearby towns and villages (eg. Tywyn, other Dyfi Valley settlements, Llanbryn-mair) and 26 were staying north of Dolgellau/Mawddach estuary (eg. Barmouth, Porthmadog). Accommodation ‘further away’ was in Bala, Criccieth, Newtown, Carmarthenshire and Shropshire.

Locality of accommodation of visitors staying further away from settlement where they were surveyed



Respondents were asked if they had booked their accommodation in advance of their stay, and with whom. A large majority (58%) had booked direct with the establishment, while 4% (12 respondents) booked with the Tourist Information Centre (TIC). The percentage that didn't book in advance (12%) is much lower than the Llanidloes and Llandrindod Wells surveys (36% and 25% respectively) where again the most frequent response was that the visitor had booked accommodation directly with the establishment. The 'other' category included visitors that were staying with friends or at timeshare.

Method of booking accommodation



Respondents were asked how many nights they were spending away from home. The majority were spending 4 to 7 nights away though more than a quarter were on holidays of 8 to 14 nights. Only a small percentage was on short breaks.

Nights away from home	Adj. percentage
1- 3 nights	8.55%
4 - 7 nights	55.16%
8 - 14 nights	26.84%
15+ nights	9.44%
Total	100.00

4. Visitor behaviour

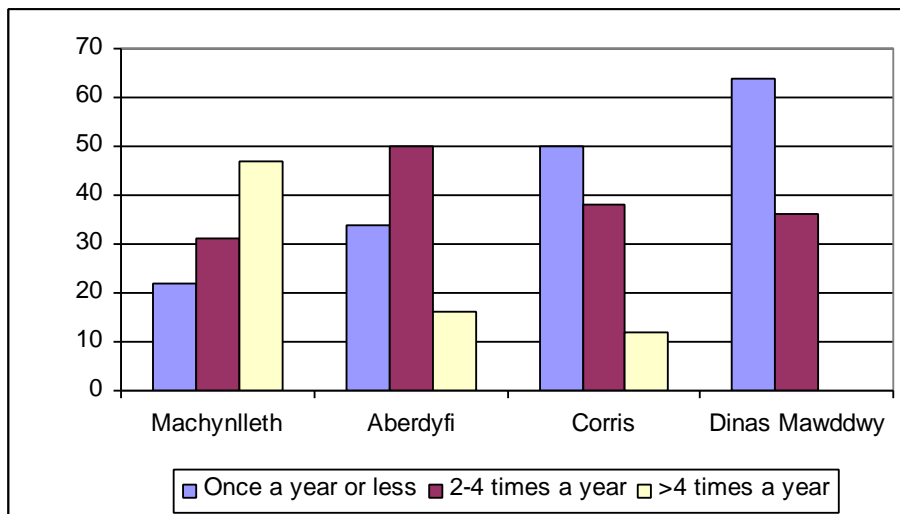
The main mode of transport for respondents getting to the settlement on the day of the survey was by car/van (90%). However 30 respondents (7%) had cycled and 6 respondents had walked.

Main mode of transport

Main mode of transport	Frequency	Adj.percentage
Car/van	364	89.66%
Bus/coach excursion	2	0.49%
Walked	6	1.48%
Motorcycle	0	0.00%
Regular bus/coach	3	0.74%
Train	1	0.25%
Bicycle	30	7.39%
Other	0	0.00%
Total	406.00	100.00

The survey showed that 62% of respondents were on repeat visits to the Dyfi Valley area. The frequency of repeat visits for each settlement was examined, and showed that the majority of respondents 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 respondents visited the town 2 to 4 times a year. Half (50%) of the Aberdyfi respondents visited the town 2 to 4 times a year.

Frequency of repeat visits as a percentage of respondents in each settlement

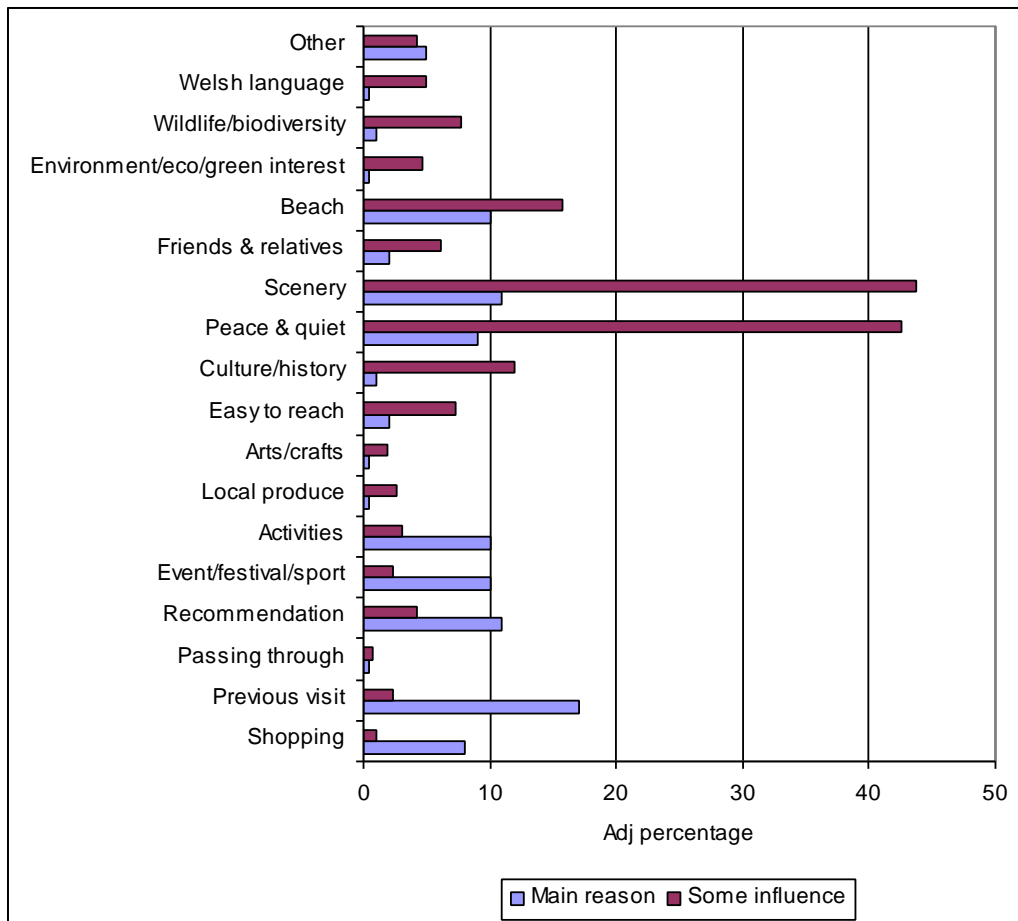


Respondents were asked to select from list their one main reason for visiting the area, and separately, any number of secondary influences. A previous visit was most frequently cited as the main reason by 17% of respondents. The next most frequent main reasons were diverse, with the beach (10%), activities (10%), scenery (11%) and peace and quiet (9%), an event/festival/sport (10%) and recommendation (11%) all being important.

By a large majority, the scenery and peace and quiet are important secondary influence for visiting the area for 43 and 44% of the respondents. The beach (16%) and the culture/history (12%) are the next most frequent responses.

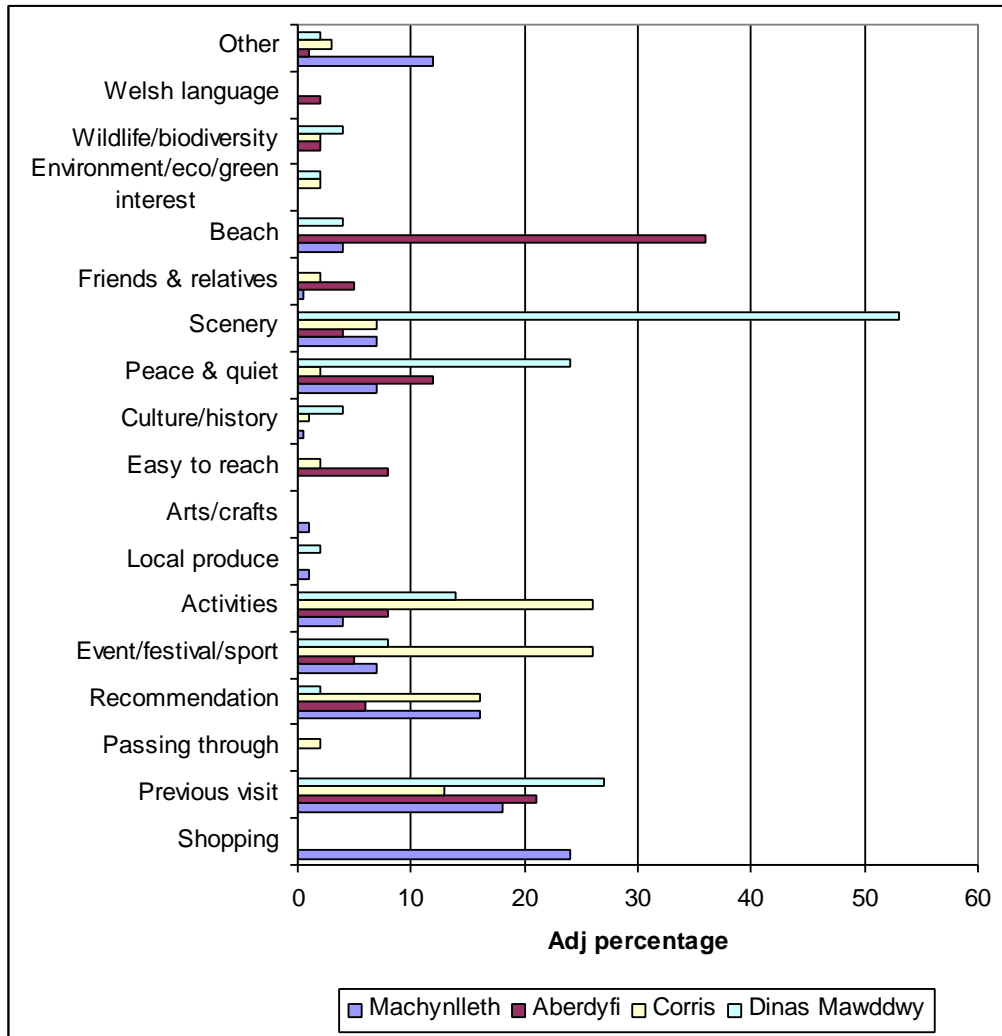
‘Other’ reasons where described included to relax or take a break, and visiting for work. Events that respondents were visiting included Machynlleth Carnival or festival events, motorbike Enduro, Aberhosan Show and the Royal Welsh Show. A considerable number were also visiting attractions including Machynlleth market, the Corris Narrow Gauge Railway, Craft Centre and Labyrinth, and the Centre for Alternative Technology.

The single main reason, and other influences in visiting the Dyfi Valley



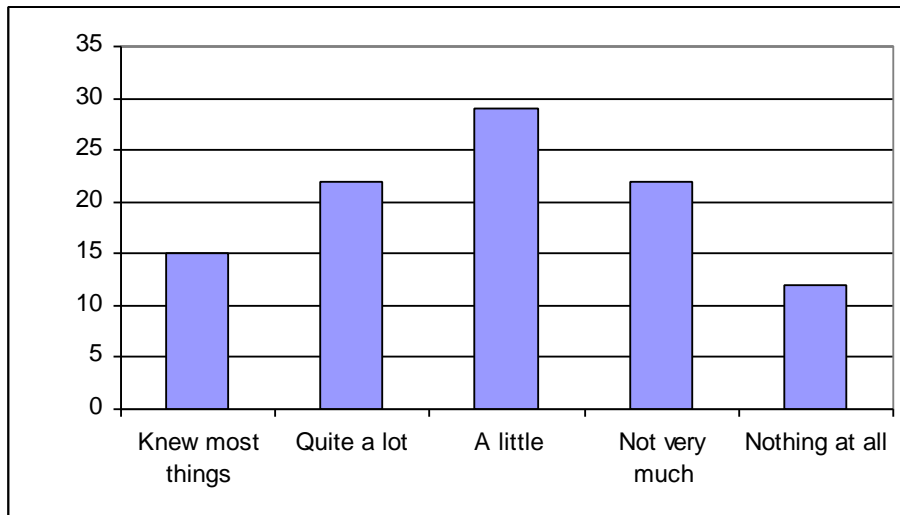
The main reasons cited within each settlement were the beach for Aberdyfi (36%) with the next most frequent being a previous visit (21%); shopping for Machynlleth (24%) with a previous visit (18%) and recommendation (16%) also important; scenery for 53% of visitors to Dinas Mawddwy, and also peace and quiet (24%) and a previous visit (27%); and for Corris an event/festival/sporting event and activities were the most frequent main reasons for visiting (both 26%).

Main reason for visiting at each settlement



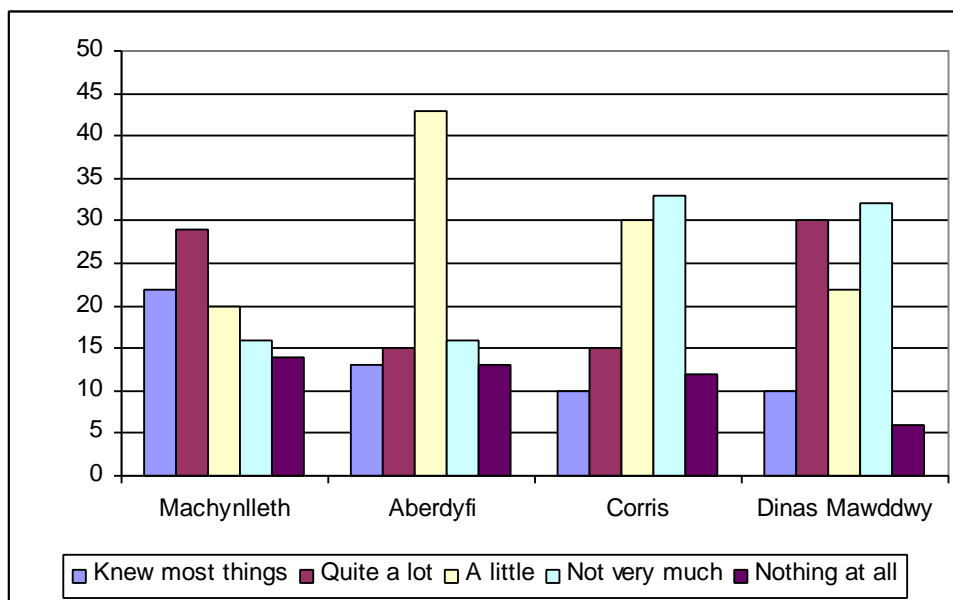
Visitors were asked how much they knew about the area prior to arrival. Bearing in mind that 62% of respondents were on repeat visits, 15% ‘knew most things’ and 22% ‘knew quite a lot’ about the settlement before they arrived. Only 12% ‘knew nothing at all’.

Prior knowledge of the settlement by all respondents



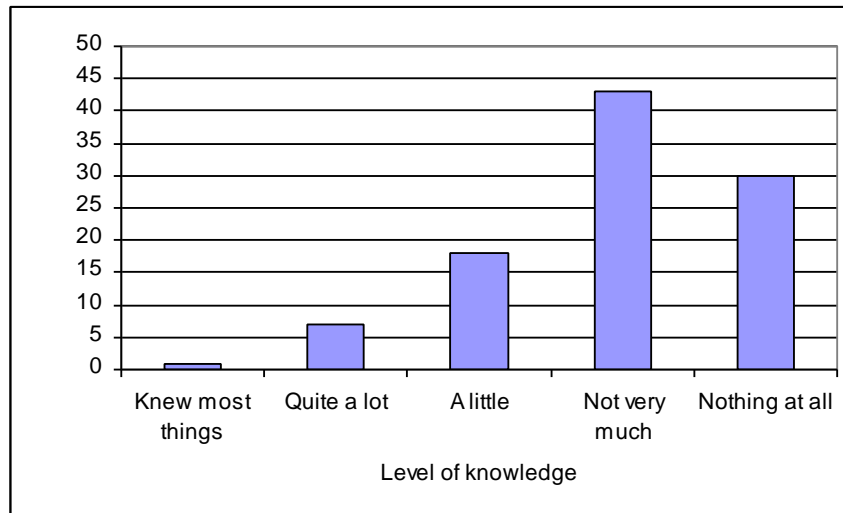
Respondents within each settlement showed a diverse response. In Machynlleth, the majority of visitors felt they knew quite a lot (29%) or most things (22%), while in Aberdyfi a strong majority only knew a little about the settlement (43%). In Corris, the majority knew 'not very much' (33%) or very little (30%), and in Dinas Mawddwy the majority were almost split between not knowing very much (32%) and knowing quite a lot (30%).

Level of knowledge of respondents in each settlement



The level of knowledge about the area was examined for first time visitors and showed that 43% did not know very much and 30% knew nothing at all about the area.

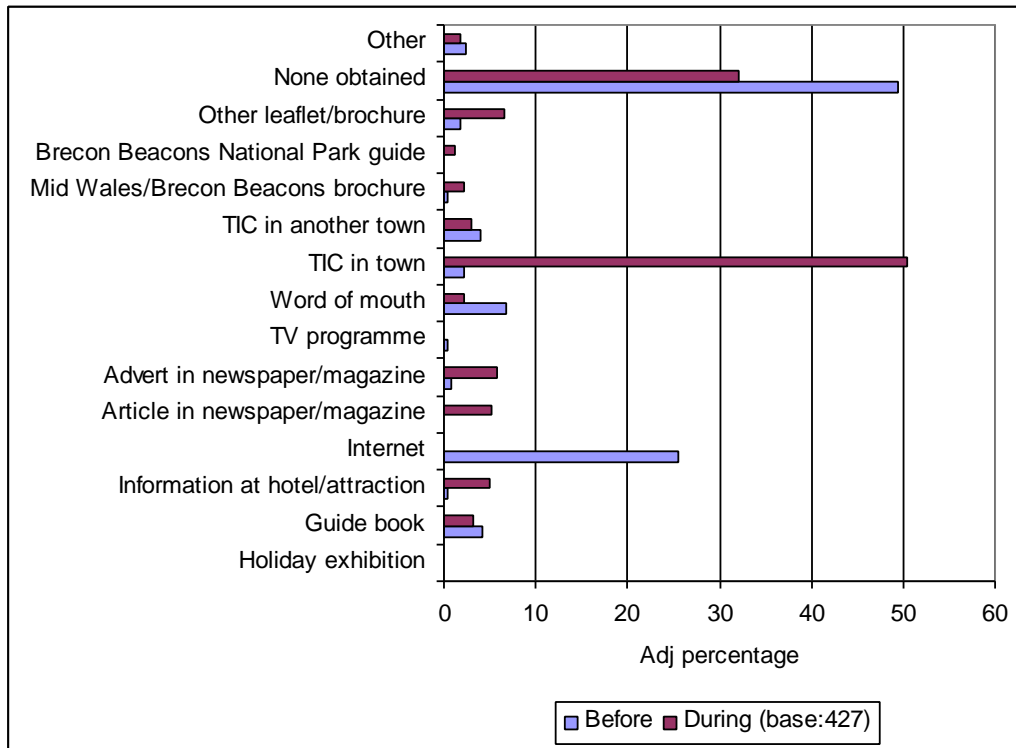
Prior knowledge of first time visitors



5. Information sources

Respondents were asked which, if any, information sources they had consulted, both before they visited and while they were in the area. Multiple answers were accepted. Like Llandrindod Wells and Llanidloes, the majority of respondents (49%) had not obtained information before their visit. The importance of the Tourist Information Centre (TIC) is clear with 50% of respondents using it during their visit. The internet is a widely used resource with 26% of respondents using it to research before their visit.

Sources of information consulted before and during visit in Dyfi Valley



Other sources of information where specified

Other information source	Frequency
Ceredigion and Cardigan Bay brochure	2
Snowdonia Mountains and Coast brochure	3
A View of Wales	2
Go Mid Wales walker/rider newsletter	6
C.A.T. brochure	1
Dyfi diary	2

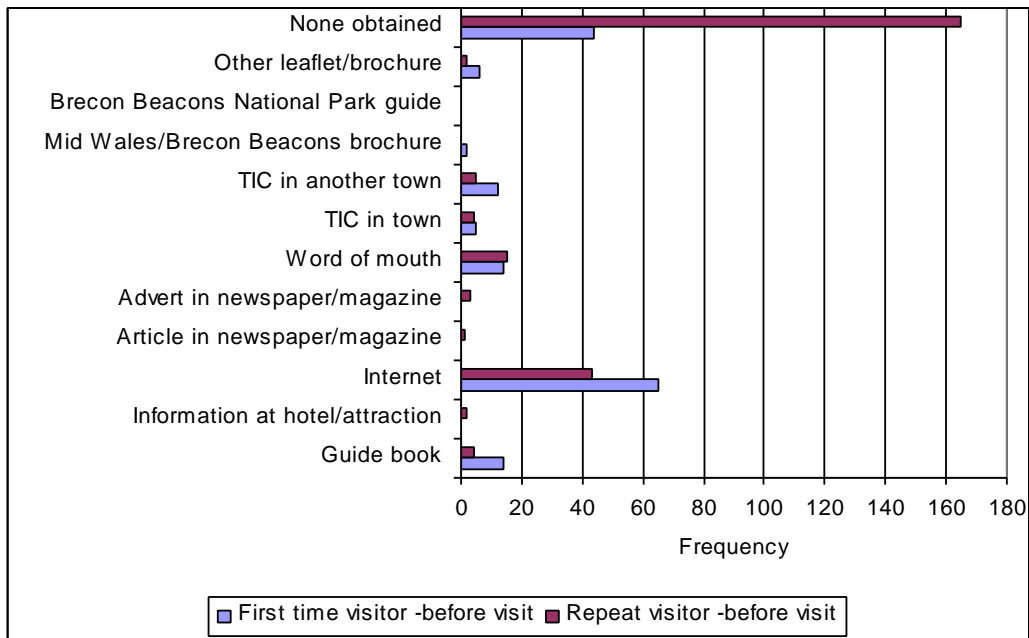
Number of respondents using information sources before and during visit

Source of information	Before holiday Frequency	During holiday Frequency
Holiday exhibition	0	0
Guide book	18	14
Information at hotel/attraction	2	21
Internet	109	1
Article in newspaper/magazine	1	22
Advert in newspaper/magazine	3	25
TV programme	2	0
Word of mouth	29	9
TIC in town	9	215
TIC in another town	17	13
Mid Wales/ Brecon Beacon brochure	2	9
Brecon Beacon National Park guide	0	5
Other leaflet/brochure	8	28
None obtained	211	137
Other	10	8

The different habits in the sourcing of information by first time and repeat visitors were compared. The first graph shows sources used before the visit and the second graph shows sources used during the visit.

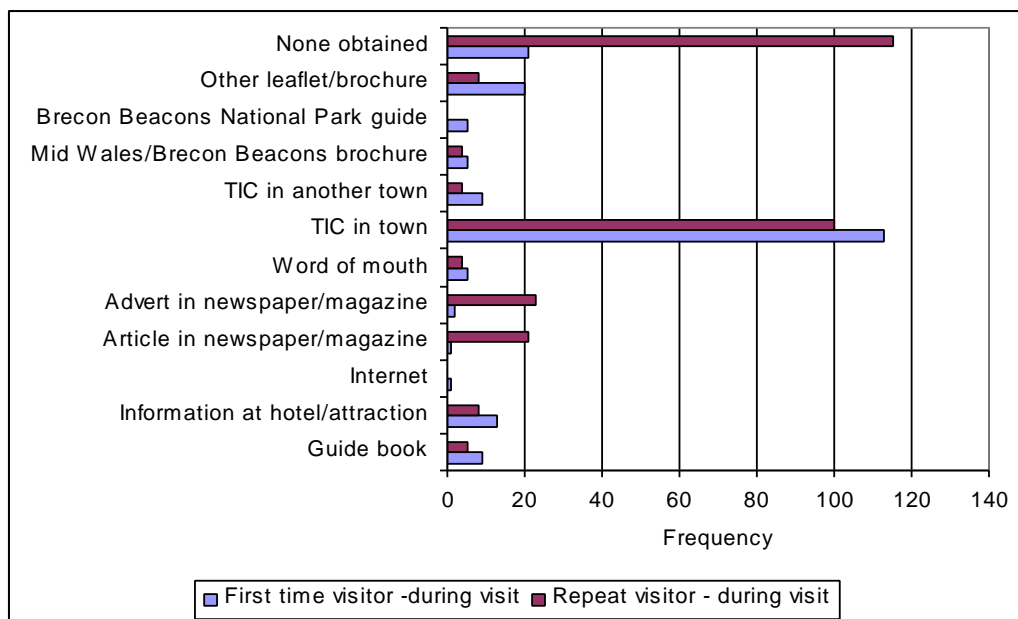
Examining information-seeking habits before the visit revealed quite predictably that repeat visitors were less likely to obtain information at all before their visit than first time visitors. First time visitors were more likely to seek information on the internet before their visit than repeat visitors: however a substantial number of both used it as an information source (65 and 43 respectively).

Sources of information for first time and repeat visitors before their visit



Repeat visitors were predictably less likely to seek information during their visit than first time visitors. However, it is interesting to note that repeat visitors use the local TIC for information almost as much as first time visitors (100 respondents and 113 respondents respectively). Repeat visitors are more likely to respond to adverts and articles in newspapers or magazines than first time visitors. Guide books are more likely to be used by first time visitors.

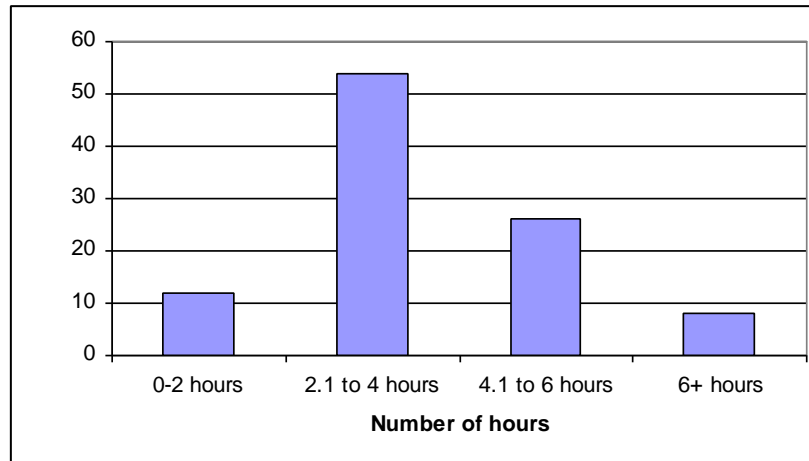
Sources of information used by first time and repeat visitors during their visit



6. Visitor activity

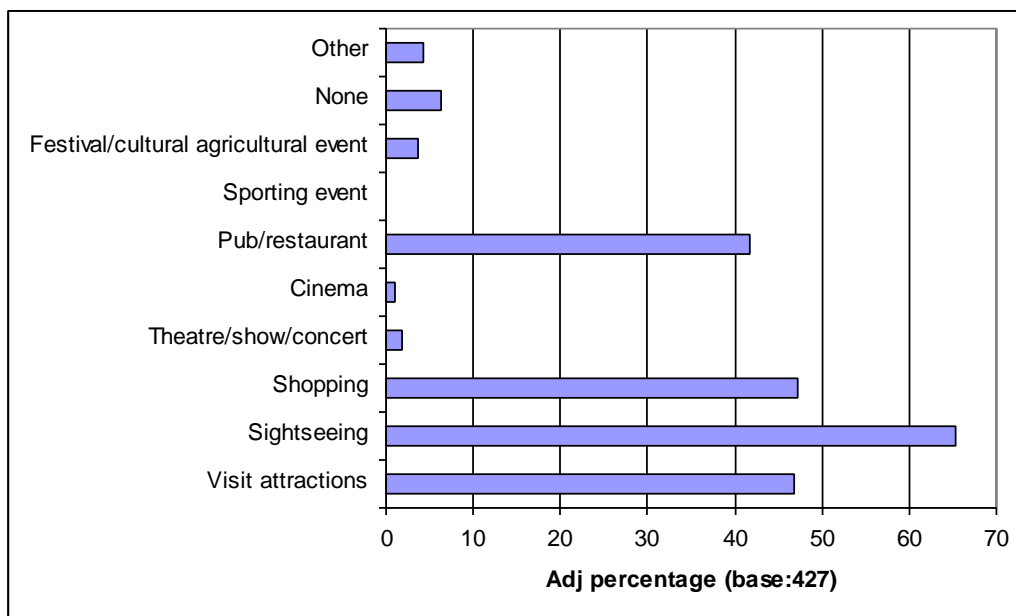
Respondents were asked to estimate the number of hours they anticipated spending in the settlement on this trip, and the majority (54%) were spending 2 to 4 hours there.

Number of hours visitors anticipated staying in settlement



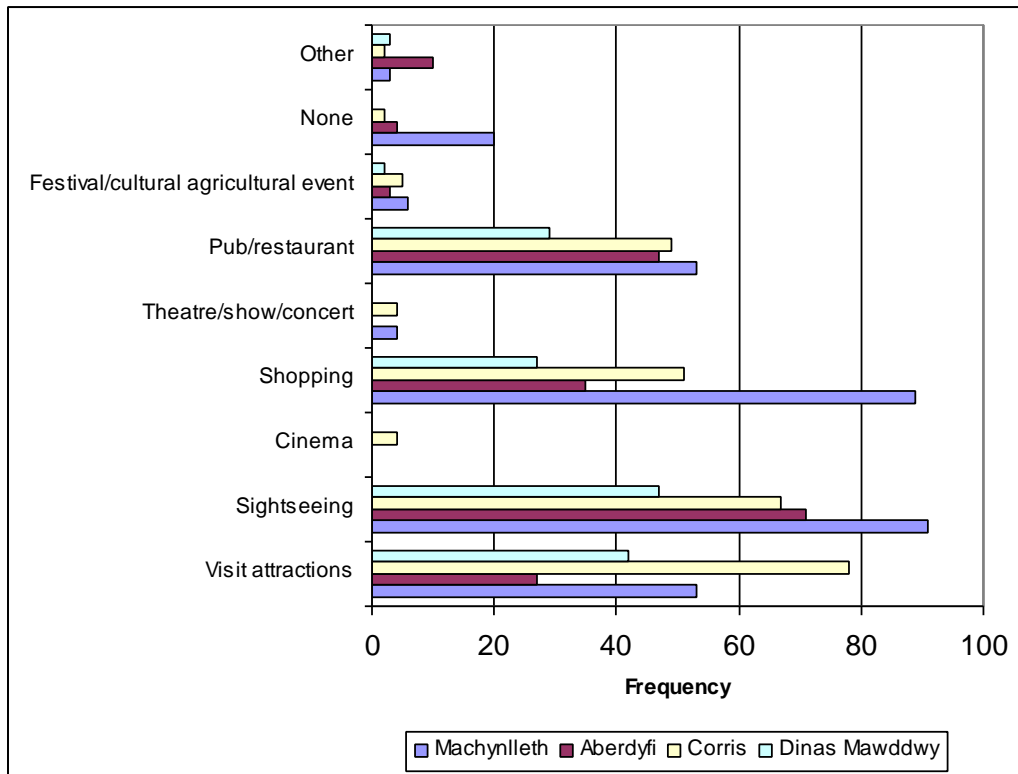
Respondents were asked to indicate from a list what types of attraction they had been to, or planned to visit while they were in the area. Multiple answers were accepted. The most frequent response was sightseeing (65%) but nearly half was planning on going to an attraction (47%) or shopping (47%) and also popular was visiting a pub or restaurant (42%).

Types of attractions visited or planned to visit while in the area



When the types of attractions are examined for each settlement, it can be seen that the opportunity for eating or drinking at a pub/restaurant/café type establishment was important in all the settlements. Shopping was also a frequent activity, particularly at Machynlleth (the market is likely to be an important attraction here). Visitor attractions were a frequent activity in Corris as well as the other settlements. Sightseeing also appears to be part of visitor activity in all the settlements.

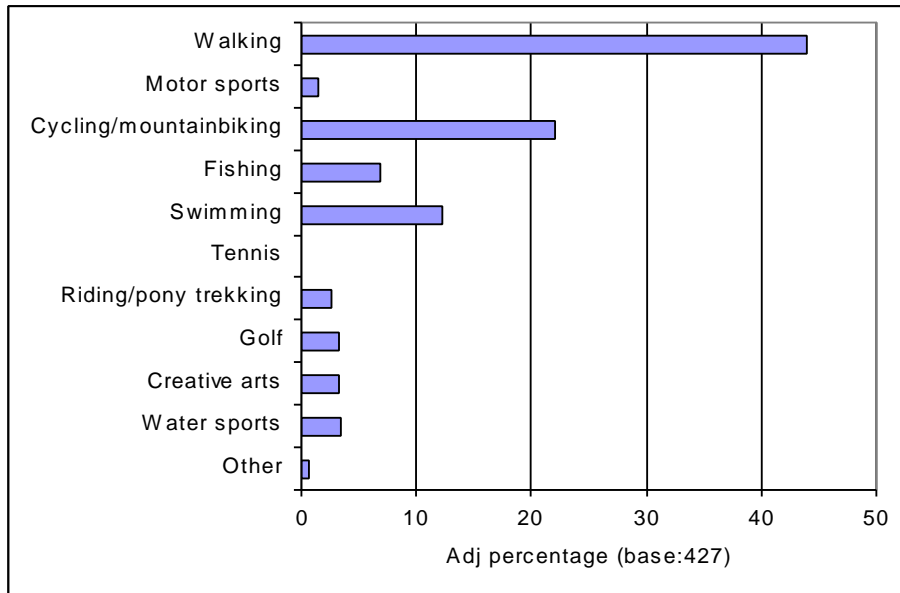
Types of attractions visited or planned to visit by settlement



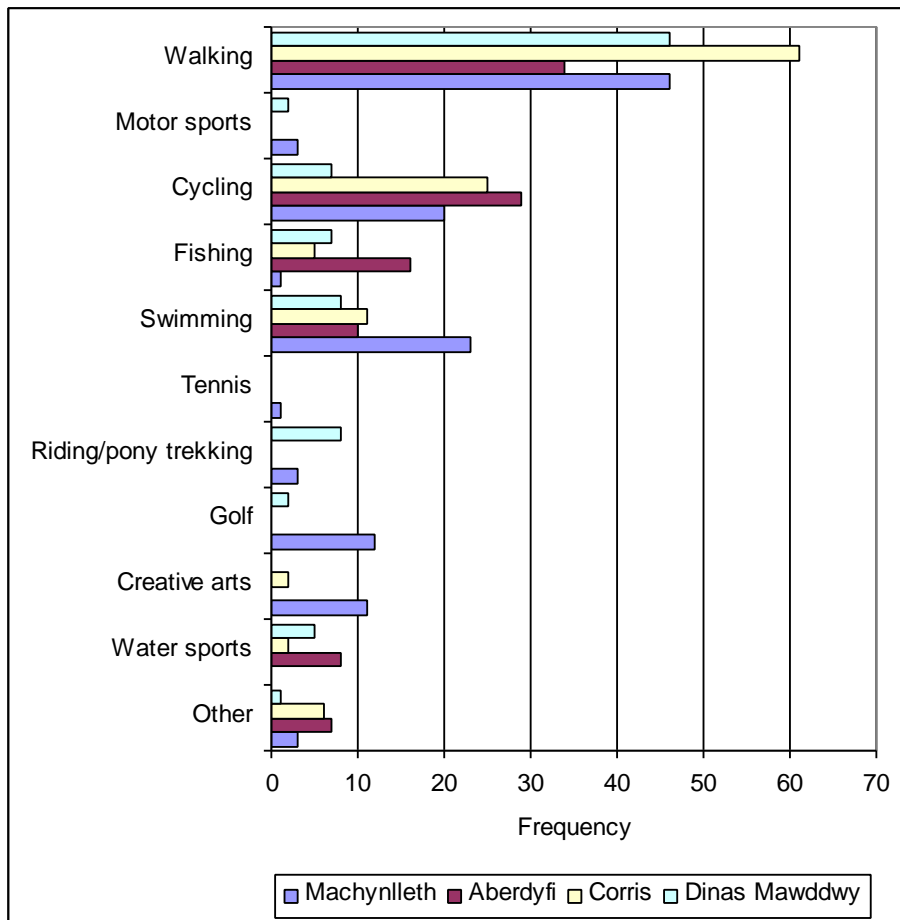
Respondents were also asked what activities they planned to undertake while in the area. As in Llandrindod Wells and Llanidloes, walking was the most frequent activity, undertaken by 188 (44%) respondents. Cycling and mountain-biking was the next most frequently chosen activity with 94 people (22%), and swimming was planned by 52 respondents and fishing by 29. ‘Other’ activities were running (2 people) and rock-climbing (1 person).

Activities were examined for each settlement, and showed that walking was the most frequent response in all the areas. Cycling was the second most frequent activity for respondents in Corris and Aberdyfi, while swimming was second in Machynlleth. Note in this graph that the ‘other’ category includes mountain biking.

Types of activities planned or undertaken while in the area



Activities planned or undertaken by respondents from each settlement

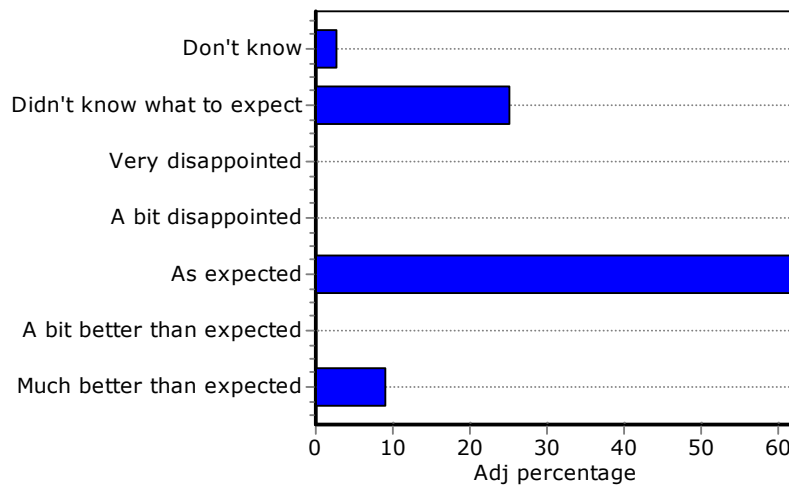


7. Visitor satisfaction

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. None of the respondents indicated that they could not recommend a visit.

When rating their visit against expectation, respondents generally found the area as they expected (63%) with 9% finding it exceeded their expectations. None of the respondents were at all disappointed.

Level of visitor satisfaction compared with expectation



Respondents were able to comment if they wished on why their visit was better or worse than they expected. Generally the comments were positive

Why the visit was better or worse than expected

Machynlleth

It's a very vibrant town.
It is a very friendly town with a lot of character.
Clean, peaceful, nice different shops.
Better range of shops - good facilities for children.
Beautiful scenery and friendly people.
Better range of shops.
A great variety of shops.
Clean, peaceful.
Clean and peaceful.
Very friendly town and quirky shops.
Friendly area.
The colours and vibrancy.

It's a vibrant town.
Beautiful place, full of heritage.
Full of history and heritage.
Concerts were fantastic.
Carnival was arranged fantastically.
Full of history.

Dinas Mawddwy

Lots of stuff to do and see.
Great place to get away from everything.
Very beautiful area.
Beautiful scenery.
Landscape is beautiful.
Beautiful.
Lots of interesting things to do and see, especially on a farm with lots of help needed.
Were disappointed that Celtica in Machynlleth has closed - that the site is in such a state - all the signs are still up.
The area was more beautiful and accessible than I thought it would be.
What a beautiful landscape.
Rain stopped us walking as much as we hoped.
As good as previous visit.
We expected it to be good but the quietness, the breathtaking scenery, the outstanding accommodation have given us one of the best holidays in years.

Corris

Everything has been improved.
Everything seems better.

Aberdyfi

Very nice people & it's a great family day out.
Nice & friendly.

Respondents were asked to rate their satisfaction with a variety of aspects of the town under 6 categories: excellent, good, satisfactory, poor, very poor and not applicable to their visit.

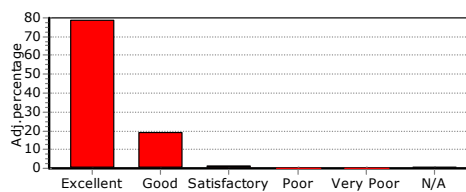
- The feeling of welcome, friendliness, general atmosphere and overall quality of the visit were rated as excellent by a large majority.
- Availability and cleanliness of public toilets, street cleanliness and parking facilities were rated as good by the majority.
- Pedestrian and road signage was closely 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.

Visitor satisfaction ratings

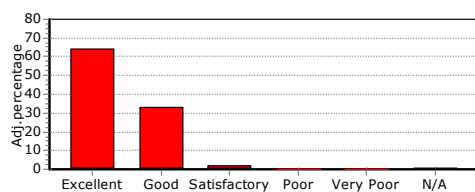
Feeling of welcome



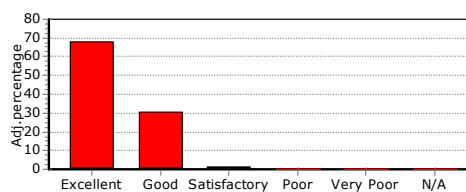
Friendliness



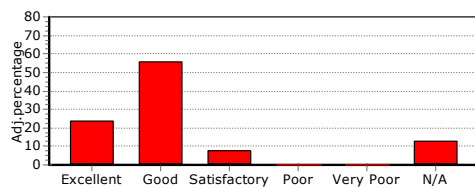
General atmosphere



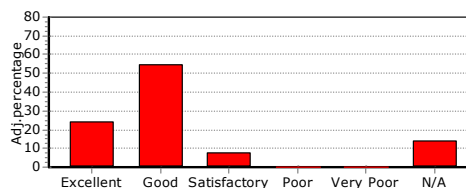
Overall quality of visit



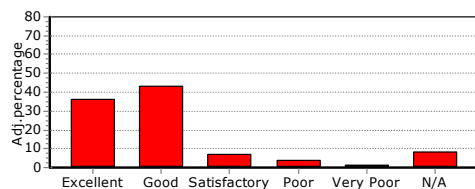
Amount of information



Quality of information



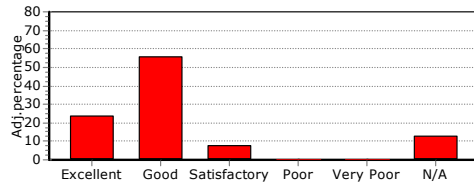
Availability of parking



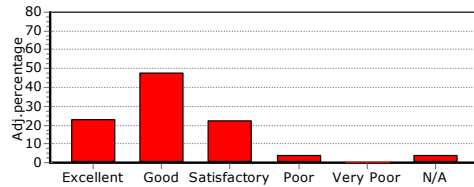
Quality of accommodation



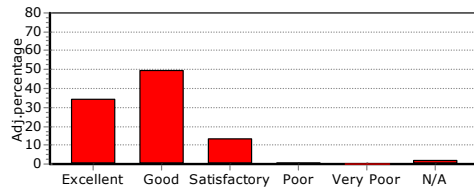
Availability of public toilets



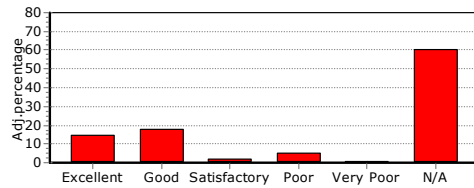
Cleanliness of public toilets



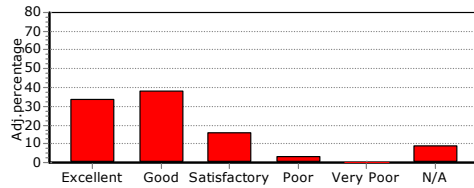
Cleanliness of streets



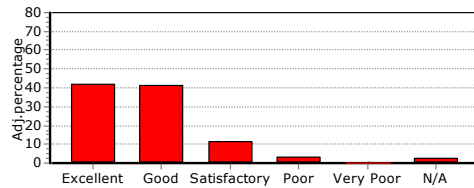
Public transport services



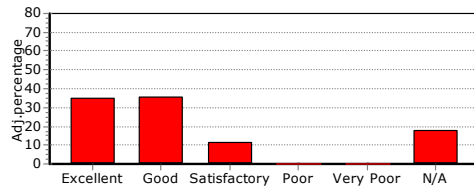
Pedestrian signage



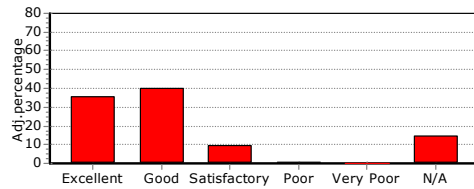
Road signage



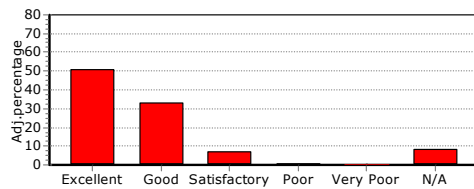
Range of activities



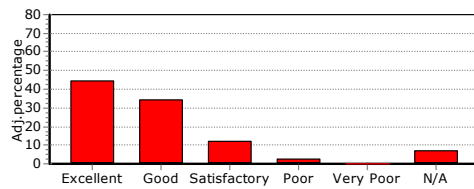
Range of attractions



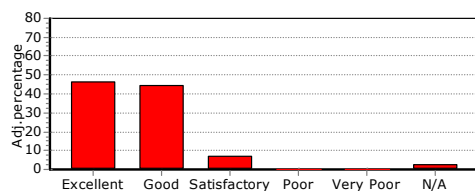
Range of eating places



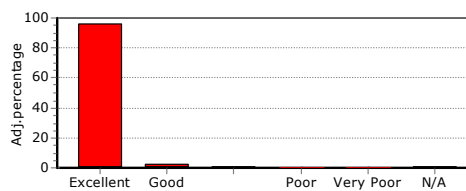
Range of shops



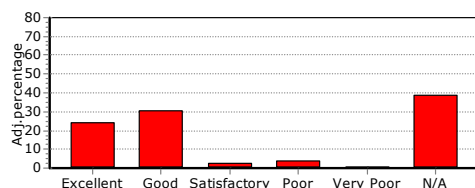
Value for money



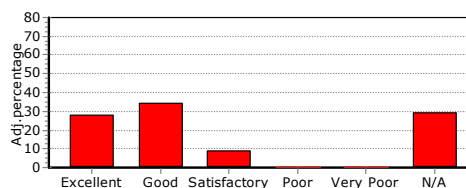
Scenery and countryside



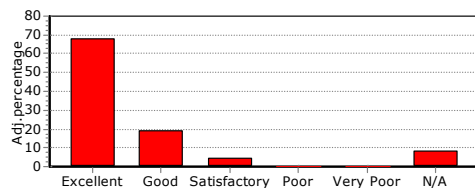
Recycling facilities



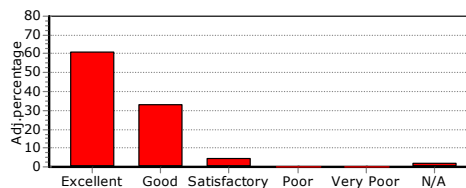
Quality of events



Quality of local food/products



Quality of service



Respondents were asked to comment on one thing that they felt could be improved. These have been grouped into similar subjects and are presented for each settlement.

Dinas Mawddwy visitors' suggestions for improvements

Better signs.
Places to open later.
Stop RAF fighters in the valley.
Better weather.
Better footpath directions.
Clearer signs.
More info on where to buy local food produce.
Nothing.
Local attractions stay open later.
Stop RAF fighters flying through valleys.
More sunshine please.
Place more footpath direction indicators on paths and right of ways. Some paths were obscured by bracken and the route destination impossible to see.
The weather; more info on where to buy local produce would be nice.
Weather.

Corris visitors' suggestions for improvements

Eating facilities
Pub in Corris craft.
More variety of eating places – Italian.
More variety of eating places and they're all fully booked in main season.
Too much accent on health foods.
More proper food.
More places to eat.
More eating places.
More restaurants.
General
More indoor attractions.
More range of places to visit.
Better footpaths.
Weather.
Nothing -it's perfect.
Nothing.
Better public transport.
Better public transport.
More publicity.
Advertise campsites better.
Better signs.
Better signs and access roads.
Nothing –lovely as it is.
More facilities in Corris –shop.
Better accessibility to footpaths.
Cycling
More cycle paths.
More cycle paths.
More cycle paths on narrow roads.
Better cycle paths on the coastal road.
More great cycle paths.

Machynlleth visitors' suggestions for improvements

Cycling
Make more bicycle routes.
Better cycle paths.
Better cycle paths towards Aberdyfi.
More cycle paths - Pennal and Tywyn direction.
General
Keep it as it is.

Less dog litter.
Dog dirt.
Dog litter.
Less dog dirt - more bins.
More bins.
Traffic flow.
Traffic flow through town.
Clearer signs.
Clean signs.
Cleaner signs.
Shops open longer.
Shops should be open every day.
Stop 1/2 day closing on Thursdays.
Show it off.
Advertise it better.
Better public transport.
More tourist attractions.
More walkways.
Take Celtica signs down.
Do something with Celtica.
More activities for children.
Better entertainment for children.
Activities for children.
More things for children to do.
Better amenities for children.
More facilities for little babies.
Toilets
Free public toilets.
More public toilets.
Free toilets by Celtica to be open.
More public toilets –free.
Free toilets.
More free public toilets.
Toilets by Celtica to be open.
Parking
Free parking.
Car park.
More parking space within the Tabernach.
Better parking.
Parking.
Nice car park by the Millennium Bridge.
More parking.
More parking facilities.
Better parking facilities on market day.
Better parking facilities.

Aberdyfi visitor suggestions for improvements

General
Don't change it.
Less dog litter.
No more building.
More bilingualism.
Cycling
More bicycle racks.
More cycle racks & tracks.
More bicycle racks.
Toilets
More toilets ladies.
Sanitary bin in the ladies toilets.
More ladies toilets.
More public toilets.
Parking
Better parking facilities.
Improve roads.
Better roads.
More free parking spaces.
Free parking.
Free parking facilities.
Free parking & no more building.