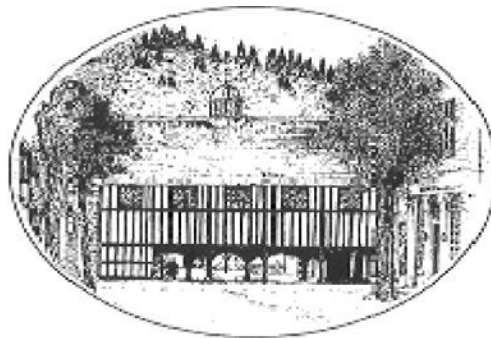




# Powys Integrated Quality Management Research Project 2006 Executive Summary: Llanidloes



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## Context

The research phase of the Integrated Quality Management (IQM) project combined a visitor survey, a trade survey and a community audit for Llanidloes and the surrounding area (including Clywedog Reservoir) over a 10 week period between July and September 2006. A total of 313 visitor surveys were completed during the available time and 27 trade surveys were received from businesses that had some contact with visitors, including accommodation providers, attractions and shops (a 25% response rate). Community audits were carried out in mid July and mid September using a standardised form, which 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 and graphical illustration can be found in the full reports.

## Visitor Survey

1. The most frequent age range of the survey respondents was the 45-54 year olds (32%). 83% of the respondents were between 35 and 64 years of age and the majority of the respondents' accompanying parties were also within this age range. Only 19% of the parties were children under 16 years.
2. Approximately 29% of respondents (89 people) were on a first visit to the area (in 2005 this was 43%) thus 71% were repeat visitors. The most frequent age range of first time visitors was 45-54 year olds. Notable was the number of repeat visitors outweighing new visitors in the 55-64 age range (65 and 16 people respectively).
3. Of the repeat visitors, just over half (52%) only visited once a year or less, while 38% visited 2 to 4 times a year.
4. A third (34%) of the respondents were on a day trip while staying elsewhere on holiday, while 29% were on a day trip from more than 3 hours away. In total, 67% were on a day trip while only 26% were on a short break or holiday of 4 nights or more, and the remaining 'other' were touring/walking or taking a break.
5. The most frequent age range of those respondents on short breaks was 35-44 years, and the most frequent age range of those on a longer holiday was 45-54 years.
6. The residence of a large majority (42%) of respondents was the Midlands, but the next most frequent response was Wales (36%) with the majority from Mid Wales (22% of respondents). North West England was the residence of 7% of respondents and London/South and East of 6%. Only 1.56% of respondents were from overseas.

7. By far the most frequent type of accommodation used by 35% of overnight respondents was the guesthouse/B&B type. 17% were staying with friends or relatives, 16% were in touring caravan/motor-homes and 15% were in rented self-catering/serviced apartment-type accommodation.
8. The majority of first time visitors were in guesthouse/B&B type accommodation (36 people), self-catering (17 people) or touring caravan/motor-homes (11 people). The majority of repeat visitors were in guesthouse-type accommodation (37 people), staying with friends and relatives (34 people) or touring caravan/motor-homes (22 people).
9. The majority of respondents (59%) had booked their accommodation directly with the establishment (this was 42% in 2005). Over a third (36%) had not booked accommodation in advance (51% in 2005). This pattern over the two years was similar in the Llandrindod Wells survey.
10. When asked for their one main reason for visiting the Llanidloes area, the most frequent response for 23% of respondents was that they were just passing through. 16% were visiting friends and relatives, another 16% were attending an event or festival, and 13% were there because of the scenery.
11. When asked to select any number of other reasons influencing their visit, the scenery and countryside was important for 75% and 67% of respondents respectively. Notably, also important was a previous visit (45%), the ease of getting there (46%) and the history/culture (44% of respondents).
12. When asked where they sourced information, the most frequent response was that none had been sought either before the visit (38% of respondents) or during the visit (48% of respondents).
13. The most frequently used source of information before the visit for 25% of respondents (79 people) was the internet, followed by word of mouth (12%) and a Tourist Information Centre (TIC) in another town (12%). For first time visitors, use of the internet, TICs and word of mouth were more frequent choices than not seeking any information.
14. The most frequently used sources of information during the visit were the local TIC (15% of respondents), information found at the accommodation or attraction (10%) and word of mouth (15%). For first time visitors, the majority had not obtained information about the area during the visit, but the local TIC, word of mouth and information at the accommodation/attractions were frequently used by those that had.
15. Similarly to 2005, when respondents were asked to select the types of 'attraction' they were planning on visiting while in the area, the most frequent responses were sightseeing (56%) and visiting a pub or restaurant/eating facility (55%). 30% of respondents were planning to go to a visitor attraction, and only 11% were not planning on doing anything.

16. For specific activities, walking was the most frequent response with 43% of respondents. A creative arts activity was also popular (40%). Fishing and wildlife/bird watching were the next most frequent with 6% each (18 people).
17. Respondents were asked if they could recommend a visit to the area and 93% said they would, while the remainder said they might possibly. These figures are virtually the same as in 2005. 61% of respondents found the area 'as expected' while 6% found it 'much better than expected'.
18. Respondents were able to comment in separate questions on why their visit was better or worse than expected, and what improvement they would like to see. The responses were written down as people expressed them and are all included in the full report. They have been broadly grouped together in categories.
- **Better or worse than expected:** generally better; lots of positive comments on the good weather, scenery and the quilt exhibition, and pleasure at finding the Clywedog dam café open.
  - **General impression:** many comments on a lack of evening entertainment/wet weather, but also some wanting the area left unchanged.
  - **Public transport:** more availability.
  - **Advertising:** many comments suggesting the area could be publicised more widely.
  - **Restaurants/cafes:** comments on finding the Clywedog café closed and a desire for a café/van at Bwlch y Gle.
  - **TIC:** some questioning of its whereabouts (having been shut down).
  - **Parking:** comments on the shabbiness of the Gro car park, and also the need for more parking facilities.
  - **Toilets:** closed toilets at Bwlch y Gle particularly on the bank holiday.
19. Respondents were asked to rate their satisfaction with certain aspects of the town on a 5 point scale. These results were compared with 2005 (which had a smaller sample size of 198 respondents).
20. There are notable differences between the years with most aspects being rated more highly in 2006 than in 2005, and many aspects being considered 'excellent'.
- More respondents thought the feeling of welcome, general atmosphere, friendliness and overall quality of the visit was 'excellent' than in 2005.
  - The amount of information and its quality was also found to be 'excellent' by more people than in 2005.
  - The range of attractions and activities, and the quality of events were rated as excellent by the majority of respondents.
  - Public services, including the availability and cleanliness of toilets, availability of parking and street cleanliness were all rated more highly than in 2005.
  - Pedestrian and road signage was rated as excellent.

- The quality of accommodation was rated as ‘excellent’ and the range of shops and eating places were rated most frequently as ‘good’.
- Public transport was the only aspect rated primarily as poor (though was only relevant to a small percentage of respondents).

## **Trade survey**

21. The 27 responding businesses to the survey supported 45 full time jobs and 64 part time jobs between them, including owners and family.
22. The owners/staff of 12 of the businesses had undertaken some form of training in the last two years, of which the most frequent format was workshops and seminars. 13 businesses felt they and their staff would benefit from the opportunity to learn more about what the area has to offer visitors.
23. To more than half of respondents (56%), improving their environmental performance was ‘very important’ to them. Approximately 89% felt it was ‘very’ or ‘quite’ important to offer local food or products to visitors.
24. The most frequent method used by respondents for marketing their businesses was word of mouth. The next most frequent methods (both 12 respondents) were by the businesses own website which they maintained themselves, and the Tourist Information Centre. Other methods used were free/commercial websites, leaflets and brochures, and signposts.
25. 18 of the respondents provided racks of leaflets for visitors to use, and 24 businesses informed visitors about events and festivals in the area.
26. Where specific visitor markets were targeted by businesses, outdoor activities featured strongly both currently and for future plans.
27. The perception of businesses on how visitors spent their time was largely focussed on outdoor activities like walking and fishing.
28. When asked to select from a list their perceived changes in the last two years, 8 businesses felt it had been busier while 12 felt it had been quieter. Other frequent perceptions were of improved roads and an improved range of attractions/events.
29. Businesses rated their satisfaction with aspects of the town on a four-point scale from ‘very satisfied’ to ‘poor’. In most cases, the majority of businesses found services and facilities to be satisfactory or adequate. Public toilets were widely considered ‘poor’. Mixed responses were received for the bus service, eating places and footpaths. Clearer levels of satisfaction were demonstrated by cleanliness, information provision, locally sourced products and green space in the town.
30. Some businesses made comments and suggestions on improvements they felt could benefit visitors to the area and local communities. Better signage for accommodation/attractions was a common theme, and also improved toilet

facilities. The need to encourage more visitors to the area was also frequently suggested.

## **Community Audit**

- 31.** The town was audited by the researcher on July 11<sup>th</sup> and again on September 14<sup>th</sup> 2006.
- 32.** The ambience of the town was generally considered good, and problems highlighted were considered minor though still important.
- 33.** There was some problem with litter particularly in the vicinity of the Old Market Hall and the car park to the Spar, despite plentiful litterbins. There was some vandalism occurring in the town, with the bus stop an area of particular concern (next to a car park often used by visitors driving in from the south). Though not excessive, dog fouling of pavements was occurring.
- 34.** Road signage from the A470 was considered adequate but brown signage was lacking on the new roundabout. The brown sign at the southern entrance looked tired and did not specify attractions and amenities. Town facilities (e.g. swimming pool, play areas) were considered well signed.
- 35.** On the entrances to town from the minor roads, the town signs had a tendency to be dirty, and one had become obscured by vegetation by the time of the second audit. There was a general lack of planting around the town signs that would enhance the welcome, though planting in the town itself was plentiful.
- 36.** Car parking appeared to be an issue within the town, with both pay-and-display and free parking and demand for space from residents. Car park interpretation boards were considered old and tired.
- 37.** The TIC was closed between audits and alternative arrangements had not been set up by the second audit, though local information was also available in other attractions. Travel information however was hard to find following the TIC closure.
- 38.** Events were widely advertised in shop windows and notice boards though these sometimes appeared cluttered. Walking trails and historical trails existed with supporting information/signage, though the Methodist Trail was not signed or advertised.
- 39.** Toilets were considered satisfactory, if basic. The notice did not inform people wishing to use the disabled facilities where the key was available (this was commented on in 2005). Disabled facilities were only big enough to allow one person to access them.