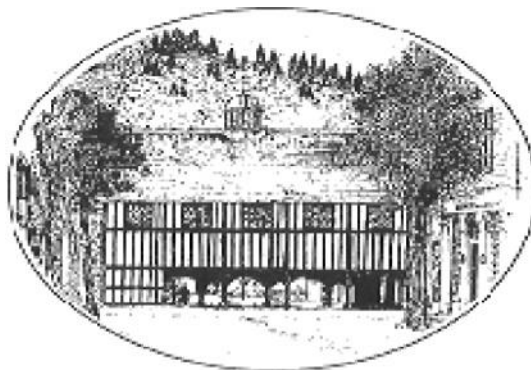




Powys Integrated Quality Management Research Project 2006 Business Survey: Llanidloes



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1. Introduction

The trade survey was posted out to 108 businesses in the Llanidloes locality that had contact with visitors (accommodation, attractions and shops) in July 2006. There were 27 respondents which is a 25% response rate. Although this is a satisfactory response rate to a postal survey, the numbers are still low and therefore it is recommended that the results are used for information rather than strategic purposes.

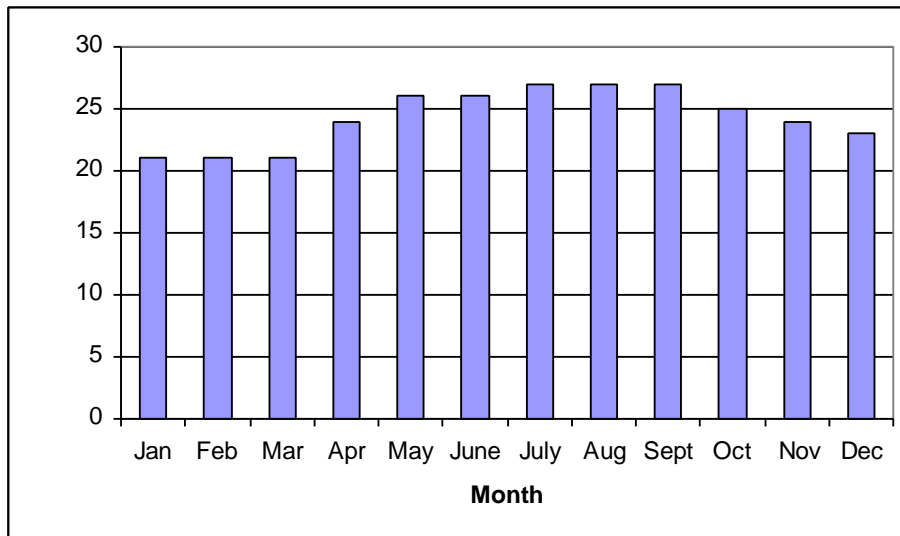
Because of the small sample size, the results are generally reported as 'frequency' (number of respondents) rather than percentages. At some points of the report, comparisons are made to the 2005 trade survey which included many of the same questions. The 2005 survey had a total of 16 respondents, therefore can only give a superficial comparability.

When reading the results one needs to consider that 8 of these businesses were primarily visitor attractions/food providers, 13 were accommodation providers of various sorts, 4 were shops and 2 were other service providers. Respondents could leave out questions that were not applicable to their businesses, or that they did not wish to answer.

2. Business activity

Respondents were asked to indicate which months of the year their businesses are open for trade. Twenty-one of the 27 businesses are trading for the whole year. The months when businesses are least likely to be open are January to March.

Months open for trade



Businesses were asked to indicate how many people were employed including themselves and family members. The majority had less than 3 full time or part time people working. The 25 businesses that responded provided 45 full time jobs and 64 part time jobs between them.

Number of businesses employing full time and part time people.

Number of staff	Full time	Part time
<3	17	10
3 to 5	4	4
>5	1	3
total	22	17

3. Business development

Respondents were asked to indicate whether they or their staff had undertaken any training relevant to their business development in the last two years. Twelve (44%) respondents had attended some form of training while 14 had not. The most frequently attended format was workshops and seminars.

Type of training	Frequency
Familiarisation visits	3
Distance learning	0
Workshops/seminars	10
NVQs	1
College/University	2
Other	2
Total	18

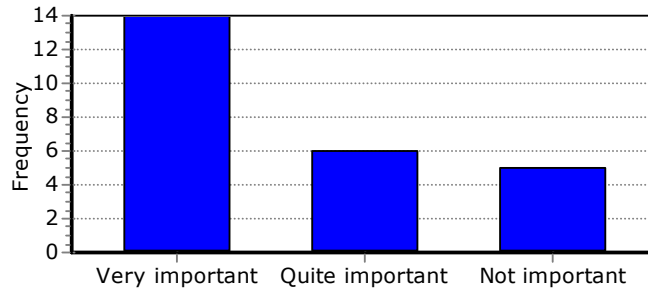
Respondents were asked what they felt were the main obstacles facing their businesses. Their comments are written below as they appeared on the survey form. A common response was the relatively few visitors to the area.

Perceived obstacles facing business development

Low footfall particularly between February and April.
Accessibility; Newtown by-pass 'please'.
Increasing prices, increasing number of corporate clients.
Poor signage; weight limit on bridge; poor local restaurants and hotels.
Getting qualified guides.
Red tape, form filling and government interference.
Supermarkets.
Cost of advertising, inability to advertise as not WTA accredited through choice.
Mid Wales does not attract enough visitors - those that come don't stay long enough.
Fuel costs.
Lack of action in changes to town, less talk more action required by Powys county council and Llanidloes town council and L.L.A.N.I. Ltd.
Lack of tourists and facilities such as eating places.
Lack of visitors to the area; complete failure of councils to support traders in Short Bridge Street.
Marketing.
Llani needs to attract more visitors.
Lack of continuity which would come from having a full time employee.
People moving into the area who then complain about our activities.

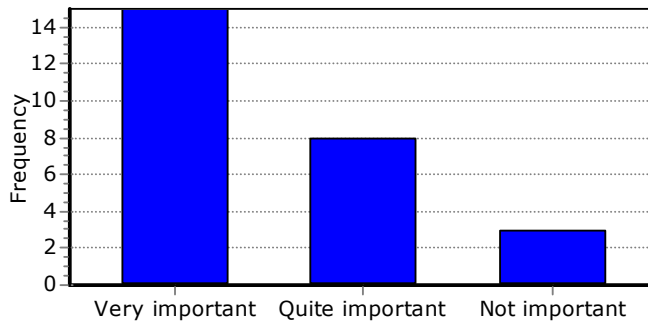
Businesses were asked how important improving their environmental performance was to them. To more than half (56%) of respondents it was 'very important', and 12 businesses indicated that they would like further information about Arena Network's Green Dragon environmental management system.

Importance of improving the business environmental performance



Approximately 89% of the respondents considered that it was 'very' or 'quite' important to offer their visitors local products (using food as an example), and furthermore 10 businesses indicated that they would appreciate more information on where to source them.

Importance of offering local products to visitors



4. Marketing and information provision

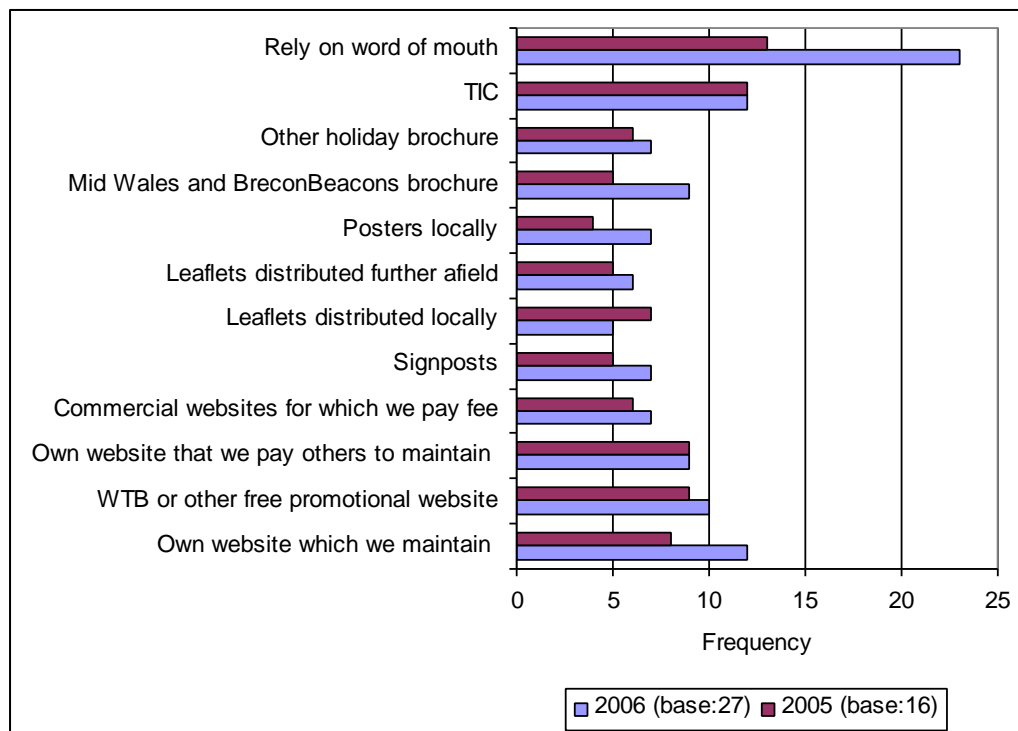
Businesses were asked to indicate from a list the main methods they used for marketing. Multiple answers were accepted. As in both Llandrindod Wells and the Dyfi Valley, word of mouth was the most frequently used method. This was also the case in the 2005 trade survey though then use of the Tourist Information Centre (TIC) was almost as equally frequent a choice. In the 2006 survey, the second most frequent marketing methods (both 12 respondents) were the businesses own website which they maintained and serviced themselves, and the TIC.

An indication of business use of the internet is given by 9 businesses providing website addresses on their survey forms and 16 giving email addresses.

For businesses that used leaflets as a marketing tool, 5 respondents distributed these themselves, while 2 respondents used a commercial distributor. Only one business indicated they used the TIC bed booking service, while in 2005, 5 businesses said they had used it.

Eighteen respondents provided a pack or rack of leaflets/brochures for visitors to use, and 17 respondents also allowed other businesses to display leaflets on their premises. 24 respondents informed visitors about events and festivals in the area.

Main marketing methods used by businesses



Number of businesses using each marketing method in 2006 and 2005

Marketing method	2006 Frequency Base:27	2005 Frequency Base:19
Own website which we maintain and service	12	8
WTB or other free promotional website	10	9
Own website that we pay others to maintain and service	9	9
Commercial websites for which we pay commission or fee	7	6
Signposts	7	5
Leaflets distributed locally	5	7
Leaflets distributed further away	6	5
Posters locally	7	4
Mid Wales and Brecon Beacons brochure	9	5
Other holiday brochure	7	6
Tourist Information Centre	12	12
Rely on word of mouth	23	13

Other brochures/magazines/newspapers used

County times and Cambrian news
National magazines and newspapers
Where to stay, WTB
Cambrian news, county times
Yamaha UK publications

Respondents were asked whether they targeted specific markets, and what sectors they were planning on targeting in the future. As is the case in both the Llandrindod Wells and Dyfi Valley surveys, outdoor activities like walking featured strongly.

Specific sectors targeted

Fishing - sell permits
Interior home decoration and clothing for women
Mature couples, fishing , golf, walking
Walking, fishing, rallying, shooting, riding, carriage driving
Walking and fishing
People who enjoy good food that can be organic/ local, people who are environmentally aware
Walking
Outdoor walkers, love of countryside
Art lovers
Arts/textile groups

Future target markets

New housing developments
Mature couples
Walking, fishing, rallying, shooting, riding, carriage driving
Walking, cycling, shooting, off-road motor cycling
Walkers and cyclists
Outdoor pursuits
Outdoor adventure

Businesses were asked how visitors spent their time while in the area, and the responses are shown below. Again, outdoor activities are perceived to be central to visitor leisure time.

Business perception of how visitors spend their time

Fishing walking, skateboarding park
Walking, sailing, clay pigeon shooting, visiting neighbouring towns, sightseeing
Walking, bird watching
Walking, fishing, golf, relaxing, visiting places of interest, away from daily pressures of city life
With us mainly, but we do organize other excursions
Workshops, clay pigeon shooting, walking, visiting quilt exhibitions
Either training at the centre or training on the mountains - visiting local tourism places
Walking, fishing, rallying, shooting, riding, carriage driving, Enduro
Walking and fishing
Touring
Sightseeing
Walking, holiday cottages, camping
Walking, cycling, shooting, off road motor cycling, eating in local restaurants, visiting museum
Walking, shooting, fishing, car rallies, biking but mainly passing through to somewhere else!!!!
Pub's, club's, shopping and walking
Walking, in town coast
Visiting friends, general tour by car
Shooting, visiting relatives, touring
Mainly day visitors stopping for a meal
Mainly walking
Walking, sightseeing
Walking; visiting local places of interest eating local places
They stay in local hotels & use the restaurants & pubs

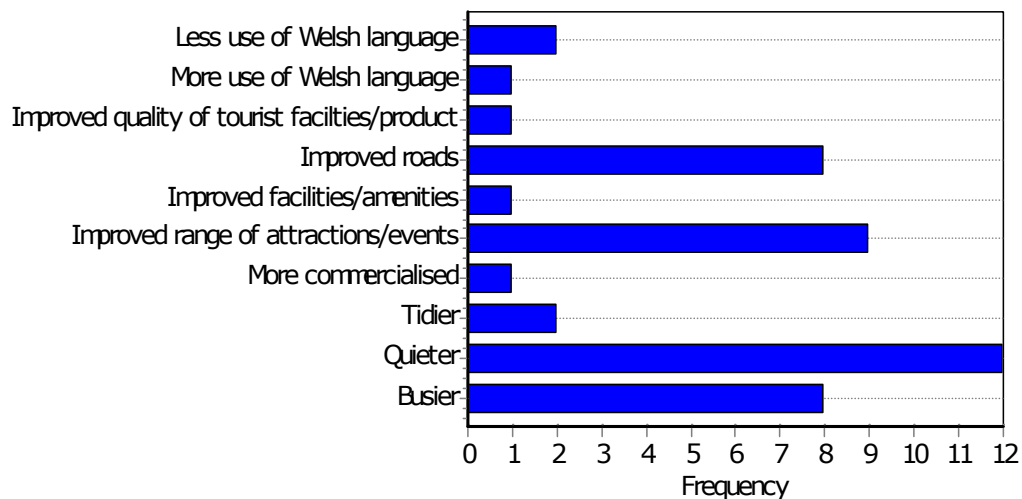
Respondents were asked if they felt that they or their staff would benefit from opportunities to become more familiar with what the area has to offer visitors. Thirteen businesses felt this would be useful while 8 did not feel they would benefit.

Businesses were also asked if they surveyed their visitors in any formal way, with, for example, suggestion boxes or comment forms. Eight indicated that they did, while 15 did not, though 5 of the latter felt they would be interested in doing so. Ten businesses also said they would be interested in helping the local authority compile tourism statistics.

5. Perception of change

Businesses were asked to indicate from a list what changes they had noticed in the last two years. Multiple answers were accepted. There was a mixed perception on whether the season had been busier or quieter, but businesses clearly felt that there had been an improved range of attractions/events and improved roads. One business also commented that more businesses were closing down, and another felt the public toilets had improved.

Changes perceived by businesses



Comparison of perceived changes between 2006 and 2005

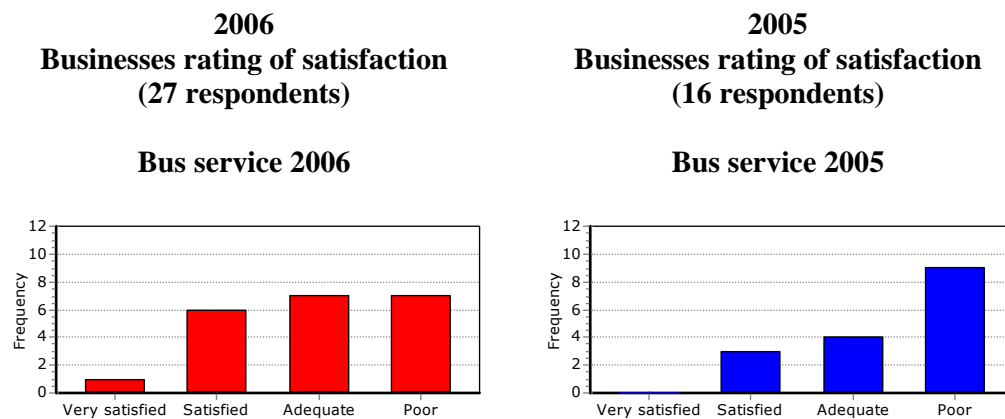
Perception of change	2006 Frequency Base: 27	2005 Frequency Base: 16
Busier	8	4
Quieter	12	6
Tidier	2	0
More commercialised	1	2
Improved range of attractions/events	9	5
Improved facilities/amenities	1	0
Improved roads	8	2
Improved quality of tourist facilities/product	1	1
More use of Welsh language	1	1
Less use of Welsh language	2	-

6. 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'.

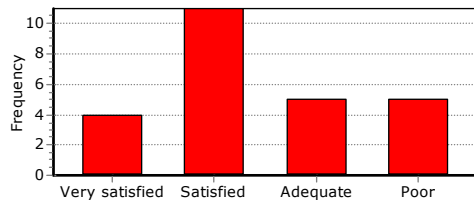
In most cases, the majority of businesses found services and facilities to be satisfactory or adequate. Public toilets were widely considered 'poor'. Mixed responses were received for the bus service, eating places and footpaths. Clearer satisfaction was demonstrated by cleanliness, information provision, locally sourced products and green space in the town.

The following graphs are compared with the 2005 survey which had a lower response rate of 16 businesses. While trends in satisfaction may be suggested, the number of respondents is too low to make it definitive.



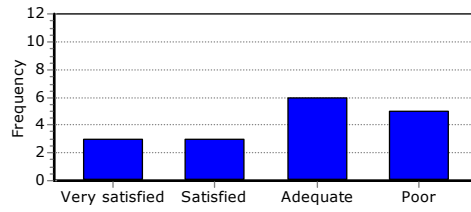
2006
Businesses rating of satisfaction
(27 respondents)

Cleanliness 2006

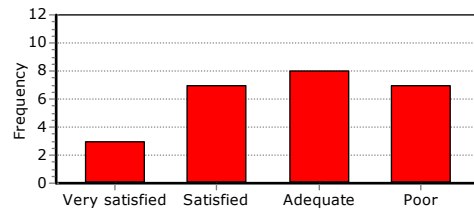


2005
Businesses rating of satisfaction
(16 respondents)

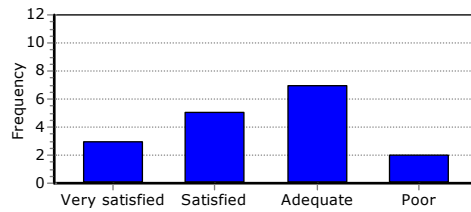
Cleanliness 2005



Eating places 2006



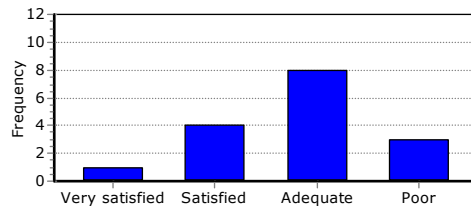
Eating places 2005



Footpaths 2006



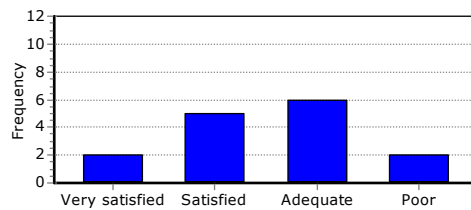
Footpaths 2005



Green space 2006

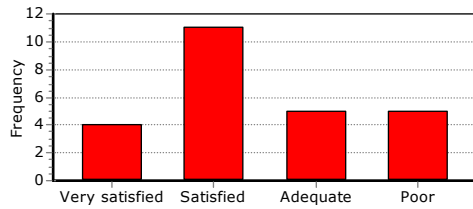


Green space 2005



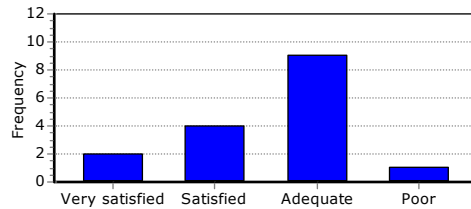
2006
Businesses rating of satisfaction
(27 respondents)

Information on events 2006

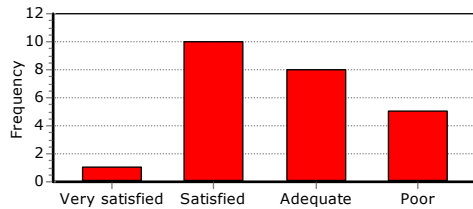


2005
Businesses rating of satisfaction
(16 respondents)

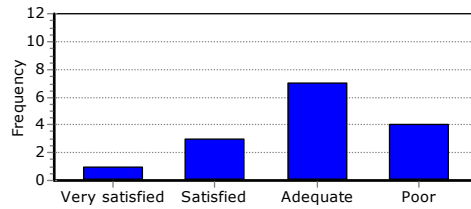
Information on events 2005



Range of shops 2006



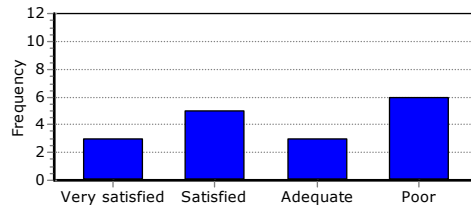
Range of shops 2005



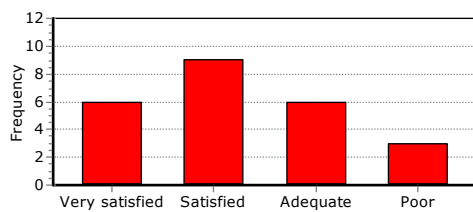
Road signage 2006



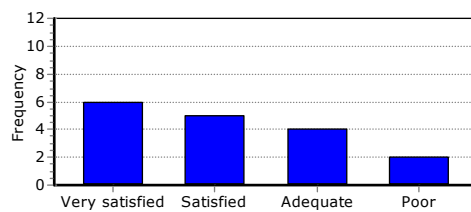
Road signage 2005



Pubs 2006



Pubs 2005

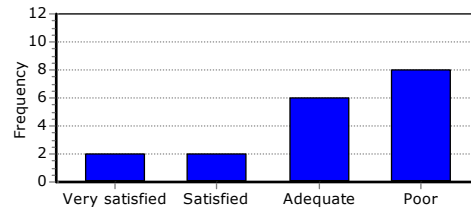
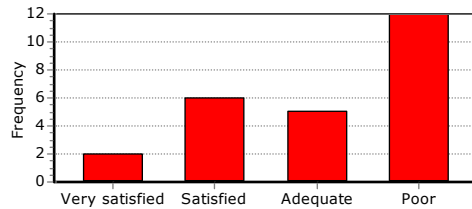


2006
Businesses rating of satisfaction
(27 respondents)

2005
Businesses rating of satisfaction
(16 respondents)

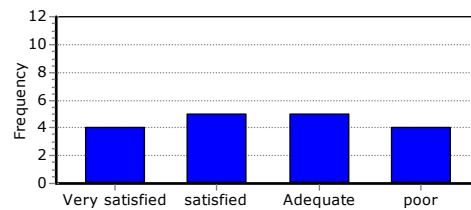
Public toilets 2006

Public toilets 2005



Locally sourced food/products 2006

Locally sourced food/products 2005



7. Suggested improvements in the provision of facilities and services

Some respondents made comments and suggestions on improvements they felt could benefit visitors to the area and local communities. 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. Their comments are presented as they were written on the survey forms. Better signage and toilet facilities are common themes.

Businesses suggestions for improvements that could benefit visitors

Toilets open at night; better restaurants; more seating in town.
More accommodation; eateries open longer, more bar meal food places.
Better use of Llyn Clywedog, more info on sailing, fishing, and possible pleasure boat trips?
Better in town road signs.
Cleaner public toilets and public areas.
Bus service.
Public toilets where signs are clear to see.
More street parking.
Charge less money for advertising.
Re-open public toilets at Llangurig and signpost it.
Ban chewing gum - or train folk to dispose of it properly, promotion of local shops in the area.
Farmers market, shops, better signage, up-market restaurant.
Re-open public toilets, upgrade accommodation.
More signs outside town.
Brochure.
Open more footpaths to make it easier for visitors to find their way. Better signage.
We are sitting on a gold mine in mid-Wales. We need globally better promotion of the beauty that is around us. Ireland reaped the benefit of tourism, with their knowledge of entertaining and welcoming people and producing fine restaurants and service. B&Bs are signposted on roads. People go to Ireland for its beauty not activities. We have the same beauty here.
Accommodation register and room booking service online. National advertising campaign.
Better identifications of the area assets and highlighting to visitors - target tourism to these.
Sign for the kiosk in Llani, toilets need new flushes - the press buttons are hard for older people to use.
Better signs in town; more parking. Better/cleaner loos.
Better road signs, signs for our park are non existent we are the biggest hotel in town with 108 caravan owners and families.
Need sign for Hafren forest on north face of old market hall.

Improvements that could benefit the community

Indoor and outdoor all weather pitches.
Industrial development; more shops e.g. clothing, jewellery, shoes, children clothes, local craft gifts.
Cleaner public toilets and public areas.
Bus service.
More things to encourage people to the area, especially the young.
A grant to enable us to get a website, advertise more and buy more horses.
Affordable housing, more employment opportunities.
Taxi rank, more shops, more activities for children.
Action needs to be taken on these surveys as I have completed at least 3 over the past year - no changes have been made.
Better marketing of the area
Implement design on Llani plans to improve environment. Remove conservation area status which blocks development.
Better resources for children.
Regular servicing and cleaning of toilets.
Raising environmental awareness and fair trade issues even more.
Better parking.
More support for local businesses from county council /WAG etc.
More cycle tracks, more evening eating places, promote Llani as environmentally aware.