

Appendix 3 – Highlights of visitor survey information from 2006, 2009 and 2013

The 2013 Powys Visitor Survey reports on 479 interviews with staying visitors, carried out between March and September, including 44 in Machynlleth. The report shows some very striking differences to the rest of Powys, shown in the extracts below. These provide food for thought, but the small sample size (44) limits confidence in its conclusions.

Face to face research (see Appendix 4) carried out in Machynlleth and in Corris, Aberdyfi and Dinas Mawddwy (in Gwynedd) in 2006 led to sometimes contrasting conclusions, noted below [*in parentheses and italics*].

Origin

The vast majority (83%) of UK staying visitors visiting Powys come from England. The South East of England provides the highest proportion (30%) of staying visitors to Powys, followed by the Midlands (25%). In contrast, Wales accounts for just 16% of UK staying visitors.

A high percentage of UK staying visitors to Offa's Country (36%) and Dyfi Valley (33%) are from the Midlands, but only 18% of UK staying visitors to the Offa's Country and 17% to the Dyfi Valley are from the South East of England.

[The most common home base (37%) is the West Midlands]

For comparison, the *Mid Wales Tourism Strategy* states that "A high proportion of visitors to Mid Wales are from the West Midlands (31% in 2009) followed by residents of Wales (16% in 2009)."

Day trip origins

About three quarters (73%) of day visitors to Powys are from Wales, with a quarter (25%) from Powys itself. The South West of Wales accounts for around ... 44% of day-trippers to the Dyfi Valley.

Age

The Dyfi Valley attracts a notably high proportion of 'Older Cultural Explorer Couples' (25% of its UK staying profile) compared to the rest of Powys (9%).

Around two in five (41%) people who visit the Dyfi Valley are aged 65 and over. This is high in comparison to other sub-areas, which average 23% of visitors being 65+. And while other sub-areas see around 17% of their visitors made up of 35 to 44-year-olds, this group only accounts for 5% of visitors to the Dyfi Valley.

[The most common age range of visitors (35%) is 35-44]

Group size

A high proportion (59%) of visitors to the Dyfi Valley are couples compared to other sub-areas (which average 41%), but only 2% of visitors to the Dyfi Valley comprise friends (compared to an average of 21% for the other sub-areas).

Motivations

About half (48%) of respondents say their visit was 'to enjoy the landscape / countryside / beach' – lower than the all of Wales result (57%). 55% of visitors to the Dyfi Valley cite the landscape as a reason for their visit.

Around two thirds (65%) of visitors to the Brecon Beacons cite outdoor activities as one of the reasons for their trip, but only 16% of those visiting Dyfi Valley say they are there to take part in outdoor activities.

[The top "main reasons" for visiting are: Previous visit; Recommendation; Scenery; Beach; Activities; Event/festival/sport]

The vast majority (93%) of visitors to the Dyfi Valley are repeat visitors, which is extremely high compared to the average for the rest of Powys (57%).

[Over 60% have visited the area before]

Satisfaction

Visitors to the Dyfi Valley rate Wales overall as a place to visit especially highly, awarding an average of 9.8 out of 10.

Also rated highly is the 'Friendliness of people', with an average of 9.5 out of 10 by visitors to the area. Visitors to the Dyfi Valley offer the highest rating of 9.8.

Visitors to the Dyfi Valley offer the highest rating of 9.8 for value for money.

Dyfi Valley (9.7) scores very well on 'places to eat and drink'.

[83% said they would recommend a visit to the area. 63% found the area to be as they expected (as opposed to being better or worse)]

Length of stay

There are fewer UK staying visitors taking their main holiday of the year (14%) in Powys compared to all of Wales (22%). The Cambrian Mountains sees 30% of its staying visitors choose the sub-area for their main holiday, closely followed by Dyfi Valley (26%).

[Stays of 4 nights or more are still much more common than short breaks]