

ANTUR NANTLLE Cyf



TOURISM REPORT IN THE NANTLLE VALLEY



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Partneriaeth
Talysarn a Nantlle



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Section 1 – Introduction

For centuries Wales has attracted tourists to enjoy its wonderful scenery and unique history and this is endorsed by the numerous books and articles published tracing the history of artists, conservationists and historians who have travelled here. By today Wales is regarded as an important attraction for tourists worldwide. Figures issued by Wales Tourist Board confirm that the tourist industry contributes £3 billion annually to the country's economy. Wales has a diversity of attractions to offer, but probably its main attractions are its landscape and scenery, and it's for this that Gwynedd is recognized as one of the main tourist areas of Wales.

With over 6 million visitors coming to Gwynedd every year, many of them coming to enjoy the mountains within the Snowdonia National Park or the Llŷn or Meirionnydd coastline. The Nantlle Valley lies on the fringe of these areas; it runs from the foot of Snowdon to the Caernarfonshire coast. But despite this it has not been highly recognised as an attraction for tourists.

See map of the Nantlle Valley in the appendix.

Consequently Antur Nantlle as part of its annual general meeting decided to discuss tourism in the Valley and Mr Dewi Davies of the North Wales Tourist Partnership was invited to talk about tourism. From this meeting a group was formed to study the situation and to develop a tourist strategy for the area. This report was therefore commissioned to gather information about businesses that presently offer a service to tourists, and to look at where the obstacles and weaknesses are in the tourist market. We also try to note some suggestions and ideas to attract tourists and possible funding resources.

Gwynedd Council's Rural Fund and The Welsh Assembly Government's 'Communities First Programme' funded the research and report.

Section 2 - Purpose and Methodology

The purpose of the research was to gather information about the businesses that already profit from tourism in the Nantlle Valley as well as seeking new tourist ventures. The research consisted of desktop research on the present tourist situation in Wales, with greater detail on Gwynedd. We intended to prove how important tourism has been to the economy of Gwynedd and how it could be for the Nantlle Valley.

To correspond with the general research on Gwynedd it was necessary to gather fine data on the situation in Dyffryn Nantlle. As no fine detail was ever published numerous questionnaires were formed to create a detailed profile of the area. Three main questionnaires were formed, namely: -

- 1) Providers Questionnaire – This questionnaire was specifically aimed at those who provide services and attractions for tourists. A list of all providers was compiled and subsequently interviewed face to face.
- 2) Users Questionnaire – This was a questionnaire for those who already make use of Dyffryn Nantlle as their holiday base, or who visit the attractions that are here.
- 3) Questionnaire for Indigenous Business Providers – The purpose of this questionnaire was to discover the effect of tourism on existing businesses that does not specifically provide for tourists. Two versions were produced; one for businesses in the Nantlle Valley and one for businesses in other areas. This was to discover the difference between other areas that had a long history of involvement in the Tourist Industry with that of the Nantlle Valley.

Another part of the research was to meet people with ideas to establish a tourist business, research into possible funding resources that could assist with any specific project. We also looked at the support available to raise awareness of the area, and ways to market the present businesses and attractions.

The work was promoted by a report in the ‘Caernarfon & Denbigh Herald’ where a telephone number was given for the public to contact if they were interested in contributing to the study. It is intended to arrange a public meeting to gather more ideas towards the end of the period of research.

Section 3 – General Profile of the Tourist Industry

- 3.0 For us to understand the tourist industry in the Nantlle Valley it is vital that we discuss the industry in a Wales and Gwynedd context. This will give us a general picture on the state of the industry that will display a pattern of the general tendencies of the tourists

The data for Wales was from a survey by the Wales Tourist Board (WTB) published on their website. The facts were produced by their Strategic Department.

- 3.1 Tourists spend over £8 million a day on visits to Wales, which amounts to approximately £3 billion a year, which means it contributes 3.7% of the value of the whole economy in direct terms. These figures do not show the indirect value.
- 3.2 100,000 persons are employed in the tourist industry in Wales, which is 10% of the whole work force.
- 3.3 During 2004 the number of visits to Wales by British inhabitants was 8.9 million, which was a decrease on the two previous years but this conformed with the general trend in people's spending.
- 3.4 In 2004 1.01 million foreign visitors came to Wales and this was an increase of 13.3% on previous years. This proved that tourists' confidence had returned following the terrorist actions of September 11, 2002. Foreign visitors contributed £311 million to the tourist industry.
- 3.5 Despite the increase in foreign tourists, 93% of visitors to Wales are British. Of these 70% come to Wales on their holidays, 20% visit families and friends and 7% come on business trips.
- 3.6 According to the survey Tourism Business 2005 by WTB 48% of Wales' tourist businesses reported that they had more visitors during the summer of 2005 than 2004. Also 50% reported an increase in their turnover in the same period.
- 3.7 About 50% of all the tourists to Wales come to the rural areas with the most popular activities being walking, water activities and visiting historic attractions. The most popular attraction in Wales over the past few years has been the Welsh Folk Museum, St Fagan's, Cardiff, which attracts over 600,000 people annually.
- 3.8 Wales has over 80,000 businesses that offer accommodation to tourists and this accommodation is used in 53% of visits to Wales. This is 29% of all the money spent by tourists.

- 3.9 According to a survey by the Wales Tourist Board showing regional tourist distribution, it is North Wales that attracts the greatest numbers of tourists with 2.4 million visit to the area.
- 3.10 The largest percentage of the tourists in Wales comes from England. The largest percentage of these come from the North West including Merseyside and West Midlands. It is also interesting to note that only 10% of the visitors to Wales are here on their main annual holiday.

The facts for Gwynedd are from 'Gwynedd Tourism Strategy 2003 – 2008 Draft Consultation', also figures from the Research Unit gathered from Companies GTS (UK), TNS Travel and Tourism and STEAM.

- 3.11 Over 6 million tourists visited Gwynedd in 2000 but by 2004 the number had increased to over 7 million.
- 3.12 Tourism contributed £692 million directly into Gwynedd's economy and over 12,110 people were employed in the industry.
- 3.13 The majority of the tourist businesses in Gwynedd are small independent businesses, most are family businesses.
- 3.14 There are over 1,700 small or medium sized tourism businesses in Gwynedd offering accommodation or tourist attraction
- 3.15 Approximately 840 square miles of the land in Gwynedd is within the Snowdonia National Park. Within the park itself Snowdon is the most popular and according to the 'Snowdonia National Park Strategy' over 197,000 visitors walked to the summit in 2001.
- 3.16 As well as the Wales Tourist Board, Gwynedd is represented by two regional tourist partnerships namely; North Wales Tourist Partnership and Mid-Wales Tourist Partnership.

The list below by STEAM 2000 for Gwynedd Council shows the breakdown of tourists in Gwynedd;

Day Visitors	- 17%
Visitors on Vacation	- 78% (25% of these on non-main / extra holidays)
Visiting family and Friends	- 7%

Published by STEAM 2000 in Gwynedd Tourism Strategy.

- 3.17 The TNS report on tourists in Gwynedd presents a profile of the types of tourists that come to Gwynedd. 48% of the tourists are between 35 and 54 years old. While families are the majority of those who holiday here, the majority of day visitors are adults without children.
- 3.18 A large percentage of visitors to Gwynedd come on short journey, which are usually self arranged journeys. Tourists to Gwynedd stay an average of 4.3 nights compared to 5.45 in the rest of Wales.
- 3.19 78% of tourists in Gwynedd return for a second time or more, with 3 out of every 10 having visited Gwynedd more than 20 times.
- 3.20 The self-catering sector is the largest in Gwynedd with 52,305 bed places out of a total of 88,839 offering this service. This figure includes caravan sites. Small Bed & Breakfast accommodation is the next largest. There are very few large chain hotels in Gwynedd, in general there's a lack of 4/5 star rated accommodation available in Gwynedd
- 3.21 There's just under a hundred tourist attractions in Gwynedd. Eight have Tourist Board Star recommendation and 10 have accredited activity.
(Wales Tourist Board 2003)
- 3.22 Gwynedd is noted for its activity holidays with 30% – 40% of tourists walking or rambling (*Wales Tourist Board*). Gwynedd has 3 national outdoor activity centres; Plas Menai Water Activity Centre, Tryweryn National White Water Centre and Plas y Brenin Mountain Biking Centre. Gwynedd also has substantial marine and sailing facilities with marinas at Pwllheli, Caernarfon and Portdinorwic.
- 3.23 In 1995 the Snowdonia Mountain and Sea brand was established, it is a partnership between the county councils and the private sector. It produces marketing literature annually and it is distributed throughout Britain and Europe.
- 3.24 There are 9 official Information Centres in Gwynedd that are financed by Gwynedd Council. In recent years more of the visitors that come to Gwynedd tend to find information and reserve accommodation via the Internet.

Section 4 – The Current Situation in the Area

4.1 LOCAL BUSINESS IMPRESSIONS

All businesses were questioned about their impression on the current situation in the Valley. It was almost unanimously felt that the situation was quite poor (7 businesses¹). With lack of attractions as one of the main reasons for this (12 businesses²), and the opportunity for worthwhile development of Dorothea Quarry was missed years ago.

It was also noted that a lack of events within the Valley was also a problem (2 companies¹), especially in comparison with areas like Llanberis and Pwllheli.

On the positive side it was noted that the Nantlle Valley has a great deal to offer people who come here to stay, the good co-operation between local companies is a fine example compared to other areas (see 3.7}, and the proposed attractions bear well for a bright future (although admittedly, many of the proposed plans are either local gossip or long term aspirations of a few individuals).

1 Appendix 8.21 and 10.14

4.2 THE SIZE OF THE INDUSTRY

It is quite obvious to the majority of people who visit the Valley that the tourist industry is fairly moderate compared to other neighbouring areas. In the Study we compare the Nantlle Valley with the 5 other neighbouring areas, districts, which to all-purpose surrounds the Valley geographically. It is fair to point out that no other area compares exactly with the Nantlle Valley (Pwllheli, Porthmadog and Caernarfon are coastal towns which are much larger than the Nantlle Valley's villages and although Beddgelert is a much smaller region, Llanberis and Beddgelert can be compared with the mountainous regions of the Nantlle Valley). It is possible to compare the averages of these 5 areas with those of the Nantlle Valley, as the Nantlle Valley is an area that can be regarded as mountainous, coastal, rural and somewhat urban.

25 tourist businesses were identified in the Nantlle Valley, 23 of these took part in the survey. Of these 25 there were 7 caravan / camping sites, 4 hotels, 3 guesthouses or B&B, 3 attractions, 3 educational centres, 2 public houses (who have tourist accommodation), 2 specialist retailers and 1 holiday cottage provider¹. The 23 establishments questioned have 67 full time employees and 105-part time¹. Hotels are the main full time employers (19 posts), but it is the caravan sites that are the main full and part time employers (35 posts)¹.

According to the amount of beds provided, static caravan parks are the largest providers (with 332 caravan sites offering 4 beds each on average – that is 1328 beds)

There are 226 touring caravan pitches in the Valley and 99 beds in hotels². There appears to be a lack of mid-market accommodation (i.e. the sector between camping and upmarket hotels) with Public Houses, B&Bs, small hotels and self-catering cottages² with a total of only 26 beds. There are also 121 bed places in educational centres.

According to business size, the attractions are the wealthiest businesses with 2 out of 3 companies with an annual turnover of over £¼ million³. It appears that most of the establishments are small with 8 out of 23 or 34% of them with an annual turnover of less than £50,000³.

¹ Appendix 8.1

² Appendix 8.5

³ Appendix 8.3

4.3 BARRIERS TO THE DEVELOPMENT OF THE TOURIST INDUSTRY

All the companies (providers and inherent businesses) were asked their opinion of the obstacles in attracting tourists to the Valley. The replies can be listed under 3 categories:

- **Abstract Barriers.** Many of these are more or less impossible to address (e.g. The Valley is not near enough to Snowdon!). Others are more indefinite such as 'Lack of attractions.' These comments may contribute towards a broader development strategy rather than individual projects, but are considered useful to the survey.
- **Social Barriers.** These are part of a broader problem within the Valley and beyond that will be difficult to address.
- **Practical Barriers.** These kinds of obstacles are easier to address and could lead to constructive plans to develop the tourist industry in the area.

ABSTRACT BARRIERS

Lack of attractions

The area has nothing to get people out of their cars.

Failure to develop Dorothea Quarry

No provision for children.

SOCIAL BARRIERS

The overall untidiness of the area with a lack of building maintenance

Youths roaming the streets at night.

Public transport problems (local and regional)

Lack of local interest

Lack of public services

No investment in the area

Policing levels

Lack of cooperation

PRACTICAL BARRIERS

- Local authority Planning Policies
- Insufficient marketing at local and national level
- Lack of sharing information between the businesses
- Scarcity of places to eat in the area
- Scarcity of accommodation
- Gwynedd Council's brown signs policy
- Restrictions on the camping season
- Lack of trained staff
- Insufficient parking areas
- The price of the tourist attractions
- Poor access to natural attractions (e.g. lakes and rivers)

There are a few paradoxes amongst the comments; 5 providers showed concern about the level of maintenance in the villages whilst on the other hand many of the indigenous businesses believed that they were very tidy. None of the indigenous businesses believed that maintenance was a problem.

Other more specific shortcomings mentioned were: -

Lack of a footpath between Rhyd Ddu village and the Snowdon car park.

Since Dinas Dinlle was designated a coastal flooding area the businesses have had many problems with insurance and planning regulations¹.

In comparison with other areas the abstract and social shortcomings are quite similar (although it is fair to note that the people of Beddgelert are quite satisfied with the situation with 80% claiming that the tourist trade is very good there², with 100% stating that tourism in Beddgelert has been fully developed³). 40% of businesses in Llanberis even felt that there were not enough attractions there!⁴ The social problems listed were youths roaming the streets, lack of maintenance, lack of investment, the attitude of the local inhabitants, marketing, planning regulations in many of the other areas⁵. The problems with brown signs were also raised in other areas.

¹ Appendix 8.18 and 10.11

² Appendix 9.14

³ Appendix 9.33

⁴ Appendix 9.25

⁵ Appendix 9.11, 9.25, 9.39, 9.51 and 9.64

4.4 THE BENEFIT OF TOURISM TO THE VALLEY'S BUSINESSES

It is evident that businesses in the Nantlle Valley gain very little from the tourist industry compared to other areas. It appears that tourism contributes an average of **5.3%** to the indigenous companies' business in the area¹, whereas the average for the other 5 areas is in the survey is **43%**². This rises to **82.5%** in Beddgelert³. It appears that not one single extra post was created by tourism amongst all the indigenous companies questioned, and only one or two seasonal posts were created during the tourist season⁴. This gives an average of 0.25 seasonal posts for every business questioned. The figures for Llanberis are **2.9** full time post and **2.0** part time posts in every extra business⁵, and for Beddgelert the figure is **3.5** full time posts and **2.0** part time⁶.

This results in seasonal variation in business. The variation between winter and the tourist season to business in the Valley is **+8%**⁷, this compares with an average of **+92.25%** for all the other areas⁸, rising to **+140%** for Llanberis⁹. It is true to say that 40% of the indigenous companies saw no increase at all in business during the summer, and one of these was a public house who saw a decline in business during the tourist season.

On a positive aspect, **69.5%** of tourism providers had seen an increase in the number of tourists who visit the area, and only **17.33%** had seen a decline in their business over the last few years¹⁰. Unfortunately, only 1 of the 10 indigenous businesses questioned noted any increase in tourist business while **50%** saw a deterioration¹¹.

Many reasons were given for the increase in the providers' businesses, including more people having short holidays; the facilities for marketing on the Internet; the continuous increase in outdoor activity holidays and the specialisation of companies in specific markets.

Some of the reasons given for the decline in the market were the increase in the price of fuel, the appearance of the villages and strict health and safety laws¹³. Unfortunately many of the comments contradicted each other, e.g. an increase in business due to rising costs of holidays abroad / decline in business due to cheap holidays abroad; and an increase in business due to better roads / decline in business due to new road detour!

- 1 Appendix 10.2
- 2 Appendix 9.68
- 3 Appendix 9.29
- 4 Appendix 10.4
- 5 Appendix 9.17
- 6 Appendix 9.31
- 7 Appendix 10.3
- 8 Appendix 9.69
- 9 Appendix 9.16

10	Appendix 8.8
11	Appendix 10.5
12	Appendix 8.9
13	Appendix 8.1

4.5 PRESENT ATTRACTIONS IN THE VALLEY

It is obvious that there is a wide range of tourist businesses in the area, but surprisingly, only a few of them are specialised businesses. Apart from the three educational centres, it is only Caernarfon Airport and Lynn R Papercrafts and Railways Unlimited can be described as speciality providers. Because the Nantlle Valley has to compete against many flourishing local areas it is surprising that more companies have not ventured to develop a speciality in the niche market. This factor is underlined by the statistics given for tourists coming into the area in the first place. Many people come to the area to dive; to enjoy the fishing, cycling, motorcycling, walking and wild life¹. If one or two of the establishments were to develop a speciality in one of these sectors, it would be to their advantage when competing with similar companies in nearby areas.

One very positive aspect identified within the survey was the figures on the levels of customers who returned to the businesses. The overall average was **55.57%** of customers returning time after time². This figure includes **96.6%** in the educational centres. This figure is rather misleading as these centres include large companies and public bodies as clientele who return again to hold courses, but not necessarily with the same people. By not including figures for the educational centres it appears that **48.73%** of customers return to the same providers in the Valley³.

1	Appendix 8.6
2+3	Appendix 8.7

4.6 GAINING PUBLIC SECTOR SUPPORT

Surprisingly, only **33%** of all the providers questioned had gained financially by public sector support, and **29%** had benefited from practical help from public bodies (including Wales Tourist Board)¹. Many reasons were given for this deficiency including 'haven't looked' and 'too much paper work'².

1	Appendix 8.11
2	Appendix 8.12

4.7 CO-OPERATION

It is noted that all the other areas within the survey had organisations to enable businesses to cooperate. Some like the Caernarfon Chamber of Trade, Pwllheli Chamber of Trade and Porthmadog Chamber of Trade were organisations for traders in general, while Llanberis Business Consortium and Beddgelert Tourist Association were specific organisations to exploit the tourist industry. It could be argued that the chambers of trade appeared to be less effective than the Llanberis and Beddgelert associations, because a high percentage of the businesses questioned were not members. The Llanberis and Beddgelert Associations were also younger and very enthusiastic and were much more effective in working together / networking.

The situation in Llanberis may be a model of a system where cooperation could benefit businesses with Llanberis Area Business Consortium working hand in hand with Llanberis Partnership. Llanberis Partnership was formed after 'Prosiect Llanberis' finished (A scheme financed by ERDF funding from 1999 to 2002). Some private funding funds the Llanberis Partnership, but the project is funded mainly through grants from different funding bodies, with the WDA being the main one. Llanberis Partnership won the 'Tourism in the Community' award by Wales Tourist Board in 2003.

The Partnership's main tasks are; -

- Improve the infrastructure – footpaths, landscape, signs etc.
- Co-ordinate the business ventures
- Co-ordinate publicity
- Develop events
- Assist local groups with grant applications, e.g. playing fields etc.
- Give assistance with any aspect of tourism

The Partnership and Consortium are responsible for setting up and maintaining its website 'www.llanberis.org'.

It appears that every area in the survey has its own website apart from Caernarfon, and that the websites are very effective in helping businesses to prosper. One hotel in Llanberis get **50%** of its business through 'www.llanberis.org', and one hotel in Porthmadog get **80%** of its guests through 'www.porthmadog.org'. It is fair to say that these websites give these areas an advantage over other areas, especially Porthmadog and Llanberis areas who have very strong brand names, but there's nothing to stop the Nantlle Valley from developing its own strong brand, which could benefit the Nantlle Valley in the future.

In the Nantlle Valley cooperation is still a fairly new concept, with no formal association existing, which offers a forum for businesses. There is evidence of informal partnerships in the area with **52%** of the tourism providers working together by sharing customers when they are full, also sharing stocks and resources¹. **40%** of the indigenous businesses stated that there was a good working relationship in the Valley, while **40%** stated that there was only minimal cooperation².

78% of the providers and **70%** of the indigenous businesses would welcome better co-working.

- ¹ Appendix **8.13**
- ² Appendix **10.8**
- ³ Appendix **8.14**
- ⁴ Appendix **10.9**

4.8 MARKETING

Business providers in the Nantlle Valley have strong faith in marketing with only **4%** of the businesses admitting to not marketing at all¹, compared to **24%** in other areas². Perhaps these figures show that many businesses in other areas don't need to market their business, or maybe businesses in the Nantlle Valley believe in the potential of advertising.

69% of providers in the Valley have websites¹, compared to **48%** in other areas². **30%** advertise in the press, compared to **12%** in other areas, whilst **22%** produce leaflets compared to **4%** in other areas. This dependency on marketing as separate businesses possibly reflects the fact that the Nantlle Valley doesn't have its own tourist strategy. It is evident that the effective websites of other areas has lessened the need for companies in those areas to have their own websites.

Providers in the Nantlle Valley use a higher percentage of marketing methods than the average of other areas.

Companies were asked if they would welcome a tourist strategy for the Nantlle Valley, a strategy that would promote the Valley as a separate area and raise tourists' awareness of the Valley's existence and potential as a tourist attraction.

96% of the providers stated that they would welcome such a strategy, 4% were not concerned whilst 90% of the indigenous businesses would welcome a strategy and 10% were uncertain³. It seems that no one would refuse a strategy that would benefit businesses in the area.

Proposed ideas that could be part of the strategy were:-

- A tourist website
- Producing leaflets / booklets to market the Valley.
- Market the Valley's culture and history
- Use the quarries as a focal point (the most obvious being Dorothea Quarry)⁴.

- 1 Appendix 8.15
- 2 Appendix 9.75
- 3 Appendix 8.16 a 10.10
- 4 Appendix 8.17

4.9 BUSINESSES OUTLOOKS

Compared to other areas in the report it appears the business prospects in the Valley were very encouraging, especially in the tourist sector – 73% of the providers claimed that their future forecasts were good¹, while 40% of the indigenous businesses agreed². This compares with 52% of businesses in other areas that saw good future prospects.

Only 4% of the tourism providers in the Valley saw their situation deteriorating in the future¹, again 4% was the figure for other areas², which reflects the optimism in the area in the future of tourism.

Despite this optimism in the tourism sector, 50% of indigenous businesses in the Valley forecasting a decline in business over the next few years, which follows the regional pattern, – 60% of shops noticed a decline, also 40% of public houses foresaw their prospects as bleak during the next years³.

These retail trade figures in many areas are due to the presence of large supermarkets appearing in the retail market, with Tesco opening a new store in Porthmadog and ASDA to open a shop in Pwllheli, but there's no such stores intended for the Nantlle Valley. It certainly would be an incentive for the tourist industry in the Valley, raise hopes and save many of these businesses.

It appears that many specific sectors in the trades are having difficulties; especially the local posts offices, whom when questioned felt they were facing an uncertain future. This is due to the change of strategy in their marketplace, which will see the opening up of their services to the influences of the open market. Public houses appeared to be suffering as well, with many stating that there's a large price difference, between drinking at home and drinking in a pub, which affects their business.

Quite definitely the hotels were the businesses that foresaw the better prospects with **100%** stating that their outlooks appeared to be good⁴.

The pattern to be seen from this is that tourism obviously is the most settled sector at the moment, if not showing the largest increase over the next years. This emphasises the fact that tourists can contribute to the economy of rural areas in Gwynedd. Perhaps local customers contribute towards the day-to-day survival of businesses, but tourism can add

the extra profit that will assist with the long-term survival of businesses and could also be a factor towards the growth of the local economy.

Many have expressed concern that extra jobs created by the tourist trade are only seasonal. But it appears that the pattern is often different, with many companies willing to keep their staff throughout the winter, offering shorter working hours, trusting they will stay with the company, when the busy summer season returns. This is very evident in areas such as Llanberis, Beddgelert and Porthmadog where companies have difficulty in appointing staff for the tourist season. It can be seen in tourist areas like Llanberis that organising and arranging specific events can extend the tourist seasons. This coupled with the fact that more tourists visit the area for short- term winter breaks, means the companies are able to keep staff over the winter period

- 1 Appendix **8.19**
- 2 Appendix **10.12**
- 3 Appendix **9.74**
- 4 Appendix **9.76**

Section 5 – Businesses and Tourism Ideas being developed at present in the Nantlle Valley.

5.1 Seiont, Gwyrfai and Llyfni Fishing Association Centre

The Association was formed in 1908 to promote fishing and to protect the rivers in the Seiont, Gwyrfai and Llyfni areas. Today they own the fishing rights to 40 miles of rivers and 6 lakes. It is considered that fishing contributes three quarters of a million pounds to the economy within the association's area. The main contributors are the local anglers who spend an equivalent of £1500 per head, a year on fishing. Tourists on fishing holidays spend an estimated figure of £1000 per head.

A new venture by the association is the conversion of an old water mill on the banks of the river Llyfni in Pontllyfni into a self-catering holiday unit. It will accommodate 6 adults and children and will be decorated with a fishing theme. Although it is mainly marketed towards anglers it is available to any one who wishes to book a holiday, and will be available out of season for local use as a Community Centre.

The Association received grants towards the scheme from Gwynedd Council's 'Cwlwm Gwledig' project, 'Objective 1 funding', the 'Aggregates Levy Sustainability Fund' and the 'Council for Rural Wales'. The cost of the scheme was £346,000. The Mill will be marketed on the association's website and through a local holiday agency.

The association also runs another scheme in which they hire out boats on local lakes. This has proved very popular, as all the boats have already been hired out for the 06/07 season.

Both schemes and the number of fishing permits sold proves the importance of fishing to a rural area, with the right marketing, the Nantlle Valley can be promoted as a prominent fishing area.

5.2 Archery – Mrs. F.L. Jones, Penyffridd, Nebo.

Mrs Jones has been a member of the 'Grand Archery Society' for over 25 years. She has run several Archery businesses in the past. She ran her previous one some years ago at Hendre Hall, Talybont, near Bangor. This was an indoor business and very popular with tourists and locals. She had to close the business due to the owners' change of use of the building. The craft is becoming more popular with a waiting list to join Anglesey Archery Club (Gwynedd Bowmen)

Mrs Jones is at present seeking the landowner's permission near her home in Nebo to start an archery business. She is considering two schemes, namely:-

- 1) Placing animal shapes around the field so that archers may move from one target to another (like golf).

- 2) Place more traditional targets at a distance so that archers compete for the highest score.

She already has the equipment with the appropriate insurance in place. She would market her business with leaflets, archery magazines, her own website and the GNAS website. She would like to employ local people but that would depend on how the business developed.

Mrs Jones is also willing to consider running the business as part of a wider scheme that would offer a variety of outdoor activities.

5.3 Kate Roberts Heritage Centre, Cae'r Gors, Rhosgadfan.

The aim of this scheme is to establish a Multimedia Analysis Centre at the home of the famous author Kate Roberts in the village of Rhosgadfan. This centre includes: -

- 1) Renovating the original cottage as a museum.
- 2) Interpretation Room – here the latest technology will be used to interpret life in the time of Kate Roberts, her work and the area's history.
- 3) Seminar Room – a multi purpose room to hold various educational and community activities.

The Centre has received grants from funds like the 'Lottery Heritage Fund', the 'Aggregates Levy Sustainability Fund', Gwynedd Council's 'Cronfa Wledig Fund', the 'Community Facilities and activities Programme' and 'Tir a Môr'. The grants totalled £900,000. Work has already started and hopes to be completed by October 2006 for an official opening at Easter 2007.

The Centre should attract a variety of users, from local people who are interested in Kate Roberts' work to tourists interested in the area's history and geography. Guided walks will be organised as well as seminars and courses for schoolchildren and students. The committee is also eager to develop projects, which study the works and history of other local authors. Perhaps it may be possible to arrange tours of homes and regions of interest to the literateurs. This in our opinion would be a good idea and as we discuss later on in the report, it is possible to combine these with the Mabinogi, establishing the Nantlle Valley as the region of the Mabinogi.

5.4 Canolfan Hanes Uwchgwyrfai History Centre

In October 2002 the local area committee in Clynog Fawr succeeded in purchasing Capel Ebeneser Schoolroom, along with the chapel house, so as to establish it as a historical centre. The aim of the scheme, according to a press statement, was to 'adapt the two registered buildings and establish a project that would sustain our pride in our language and heritage and to protect it for the benefit of future generations'. It is intended to organise activities based on their heritage for school children during school holidays. There are also plans to form a digital archive of the area and create displays about

local history. There are also plans to create a National Genealogical Centre and publish an audio historical magazine for the blind. Day schools, lectures and walks will also be organised. They will concentrate on the region of Uwchgwyrfaï and district, which extends from Nefyn to Bontnewydd including the Nantlle Valley.

Another exciting project on the site will be to establish a Historic Community Garden specialising in herbs and cottage flowers. The garden is being planned by Dr Anne Elisabeth Williams who specialises in folk medicine.

The centre will open in the spring of 2006 and it will be open daily from spring until Halloween and on Saturdays throughout the year.

5.5 Bwrlwm Eryri

A venture by Snowdonia National Park and other partnerships to promote awareness of Snowdonia's cultural and linguistic heritage by gathering, recording and preserving important information. This will include literature, art, music, colloquialisms, place names, folklore and local myths and legends. The aim is to create a literary directory on the Internet thereby using modern technology so that people may have the opportunity to seek and input their own information. There will be close cooperation between the local societies and the communities. This is a very important venture for the Nantlle Valley because the area is noted for its many famous poets and litterateurs. This valuable information will be available to people who wish to learn about the history of these authors and can also be used to create walks around their communities.

5.6 Goriad Gwyrdd Eryri – Snowdonia Green Key Strategy

This venture was formed to look at ways of protecting the future of communities in the popular upland areas of North Wales. It is a well known fact that for many years more and more tourists come to these areas of North Wales to enjoy the scenery and partake in outdoor activities thus bringing many problems with them. The main problem is the transport system and parking facilities. Car parks were often full up with numerous cars parking in unsuitable places. A partnership was formed consisting of the main public bodies, namely the County Councils, Snowdonia National Park, and The Countryside Council for Wales, Wales Tourist Board and WDA. The partners had a consultation in 2002, which resulted in the formation of a strategy for the next few years. Below is a list of the Initiative's Aims and Objectives as it appears in their document, 'Strategy and Scheme of Work'.

The Aims and Objectives of the Initiative are to:

- Develop and manage tourist and leisure activities within Northern Snowdonia.
- Enhance visitors' experience.
- Increase the input of tourism into the local economy.

- Create employment opportunities and long term economic development
- Establish an integrated effective and efficient traffic system.
- Ensure access to essential services and amenities through an improved range and quality of travel opportunities.
- Reduce tourists' reliance on the private car as a means of travelling to and around the area.
- Protect and improve the area's unique environment.
- Improve parking facilities.
- Develop effective traffic management.
- Improve and extend the cycling and footpaths network.
- Effective marketing of the Sherpa Bus service.

One prominent term in the report is 'Gateways'; these are the main areas that give tourists access to Snowdon and neighbouring mountains. Therefore, these are the centres where resources will be concentrated to improve parking and public transport services.

One prominent area, which has not been considered in the report and its recommendations, is the Nantlle Valley. The probable reason is that the Valley is not noted for its tourist industry and does not seriously suffer from tourist traffic problems as other areas of Snowdonia do. But there has been a demand for the Nantlle valley to be included in the project as a gateway to Snowdonia.

One project recently introduced, which is funded by Snowdonia Green Key Initiative, is the 'Transport Response on Demand' for walkers' of the Nantlle Ridge. Due to the shortage of public transport for those who wish to walk this ridge it was decided to establish a special pilot taxi service scheme. It is a service for those who have walked the ridge and wish to return to their parked car at a price equivalent to the bus fare. It transports walkers from Rhyd Ddu to Penygroes, Talysarn or Nantlle or returns them to their cars in Rhyd Ddu as the case may be. The scheme's funding ends at Easter 2006 but if there's a high demand it could be extended. The service is very popular according to taxi service owner Huw Edwards especially at weekends. Local people as well as tourists use it, strong local opinion is for the service to continue, also expand by providing more daily trips.

5.7 Walking projects in the Nantlle Valley.

Although Snowdonia is the main attraction for walkers there are many projects to attract more walkers to the Nantlle Valley.

The first project concentrates on the coastal region and is part of the 'Wales Coastline Walks'. This scheme offers walking holidays with full accommodation package, maps and baggage transport. It offers a choice of walks along the Caernarfonshire coastline to Pen Llŷn, the length of the walk depending on the walker's time and ability. The first journey starts in the Nantlle Valley area near Clynnog Fawr and goes towards Llanaelhaearn, a journey of 8 miles. Bryn Eisteddfod Hotel Clynnog is part of the scheme. It is possible to stay there and arrange transport to return there every evening or have the baggage moved on to the next destination. This type of holiday is very popular in Ireland and on the continent of Europe and it would be possible to cooperate with the appropriate agencies to extend this service to other areas within the Nantlle Valley. It would be possible to involve other accommodation providers and offer walks in the Valley and also to connect with the Snowdonia mountain path network.

The second project is 'Traed Trysor Ifanc' (Young Treasure Trails) which is part of the 'Walking the Way to Health' programme. It is a joint project involving The University of Wales Bangor, the Local Health Board, National Public Health Service and Antur Nantlle. The Big Lottery Fund, The Countryside Council for Wales and the British Heart Foundation funds the project. The scheme aims to get people to do more walking therefore improving their health and welfare. A pamphlet has been produced that shows six different walks varying in length and time. The walks are aimed at families and inexperienced walkers. Another aspect of the project is a scheme to train walk leaders, this involves training local volunteers to lead local walks in the area. The scheme is being monitored at present to see how many are using the local footpaths and taking part in the led walks.

The third special project in the Nantlle Valley is 'The Slate Trails' (Llwybrau Llechi). These are a series of paths that lead visitors around the remains of the slate industry. The areas involved in the scheme are the Nantlle Valley, Llanberis, Bethesda, Blaenau Ffestiniog and Corris. The network of existing footpaths is given special information signs. Gwynedd Council started the scheme about 5 years ago and there are special pamphlets and a website about them. It appears that they are more popular in the areas that attract walkers such as Llanberis, but they are resources that the Nantlle Valley could review. The qualities of some of the paths need improving and more information boards about what can be seen on the walks could be provided.

Another popular venue is the Glynllifon Park footpaths, a series of footpaths around the Glynllifon Estate. They are part of the Glynllifon Park attractions. This site is the property of Gwynedd Council and as well as the walks there is a shop, craft units, café and displays. The park is an excellent resource on our doorstep but there is a need to improve the access to Glynllifon from the Lôn Eifion Cycle Track, which would benefit walkers and cyclists alike. This would also allow the Glynllifon walks to become an integral part of the footpaths and walks of the Nantlle Valley.

One other project is now being developed in the Rhostryfan area. Llanwnda Community Council is adapting the old Bryngwyn Line railway track as a walking and cycle path. They receive funding from Gwynedd Council to improve the state of the footpath and place information boards on the history of the area. They also intend to produce marketing leaflets. The intention is to cooperate with the highland railway company so that cyclists can combine their journey with a train ride. The Community Council hopes that by extending the footpath network this will improve the contact with villages on the outskirts of the Nantlle Valley.

Antur Nantlle is now endeavouring to form a group to facilitate all the walking schemes in the area and market them as a single unit.

5.8 Talysarn Community Centre and Café

The centre's Committee established the new community centre. They are a group of volunteers who were eager to improve the existing facilities of the centre in Talysarn. As Talysarn and Nantlle are within the 'Welsh Assembly Communities First Programme, public funding was made available for the project. The Talysarn and Nantlle Communities First Partnership worked with the committee to submit an application to the Communities Facilities and Activities Programme and the Welsh Assembly Government's Communities First Programme. This kind of project conformed with the aims and objectives of the programme, namely: -

- To get the local people involved in improving their communities for the future.
- To draw in funds and sponsorship from sponsors and funding agencies to complete projects.
- Ensuring that the improvements were continuous
- Encourage people to be more flexible to venture and deal with problems with new outlooks.
- To get everyone involved in problem solving and ways to tackle them.

*Welsh Assembly Government
Themes and Strategies.*

The work at the centre includes building a new hall with all the latest amenities. There will be a general hall, meeting rooms and a modern kitchen. The community group responsible for the new centre intend to use it for many local activities.

One of the ideas is to establish a ‘community café’ that would be available for local people as well as tourists. It is intended to open at weekends at first, for the local youth as well as walkers and divers coming to the area. Also under discussion is the possibility of providing packed lunches for groups wishing to take part in outdoor activities in the area. This provision could be extended in the future if there is demand. One group has already used the facilities offering refreshments for village events. It would be possible to extend this service by organising events at the centre. The activities may vary from displays, concerts and conferences. The group has a budget for marketing the scheme and will soon be contacting local newspapers and will advertise on the Valley’s website.

5.9 Llys Llywelyn Centre

Canolfan Llys Llywelyn is situated at the Barics, Nantlle. This is a complex of six industrial units, owned and leased out by Antur Nantlle Cyf. A group of volunteers rents two of the units, which they manage as a community centre for the inhabitants of Nantlle. The centre has two spacious rooms and a kitchen, activities are held there regularly, with a full programme to suit all ages that includes courses and clubs for children and youths, as well as community meetings and craft workshops. There are possibilities for the group to co-work with other businesses at the ‘Barics,’ to organise special events that would attract visitors as well as locals.

5.10 Engineering Conservation Skills Centre

The Tirwedd Trust Ltd. is a charity and a company limited by guarantee. Its aim is to ‘promote the hereditary awareness, preserve and support economic developments that respect our natural and historical resources’. One of the projects in the pipeline is to establish an Engineering Conservation Skills Centre. They are cooperating on this project with 3 partners, namely Gwynedd Council, University of Wales Bangor and the McAlpine Company. They have commissioned a feasibility study and are now in the process of forming a business plan. The group has acquired a lease of 30 years on the site of Pen-yr Orsedd quarry and it is estimated that the whole scheme will cost about £4 million. The main objective of the project is to restore the old quarry buildings and then to offer training in specialist engineering skills from the buildings. The intention is to establish an Engineering Skills Centre.

The latest development in the scheme is that the BBC ‘Restoration’ programme has shown an interest in promoting the project. They are very interested in the fact that the buildings are to be restored to their original form. This will give the site national publicity and the opportunity to compete for added funding for the restoration work.

Although this is not entirely a tourist scheme it will probably attract tourists with an interest in industrial history. The television programme will also be a means of marketing

the work and the area in general. The group intends to offer some of the finished buildings as business units and this would also draw more people into the area.

The Tirwedd group have also been permitted to start working on the restoration of the old Pumping Station at Dorothea Quarry. The engine is one of a very few of its kind still in existence in the whole world. The intention is to restore it so that the public may have access to see it.

5.11 Pant Du Vineyard and Local Produce Project

Pan Du is a farm on the outskirts of Penygroes owned by Richard Wyn and Iola Huws and their family. They bought the farm some years ago and have numerous exiting schemes for the site.

One of the main schemes is to cultivate a vineyard on the farm's slopes to produce their own wine – 'Pant Du Wine'. They have sought the advice of a specialist in wine making who attested that the land and climate were quite favourable. At present they get advice from Farming Connect and ADAS to create a business plan. Their plan is to grow three types of white grapes and three types of red grapes and after harvesting taking them to a winery for processing and bottling. The first batch of Pant Du Wine ought to be ready in 5 years time. It is hoped that they can make white, red, rosé and sparkling wine. The owner estimates that it will be possible once the vineyard is established to produce 11 thousand bottles of wine a year. It is then hoped to market it locally and beyond and open a wine-tasting centre at Pant Du.

The family also intends to produce other products on the farm. They already produce honey and are eager to produce organic eggs, vegetables and fruits. They hope to grow apple trees to make homemade cider and blackthorns to make sloe gin. There are also plans to convert the old farmhouse into a holiday unit offering local produce. It is also intended to open a café / restaurant that would use the farm's and other local produce. As has already been discussed in the report many have expressed the need for a local restaurant.

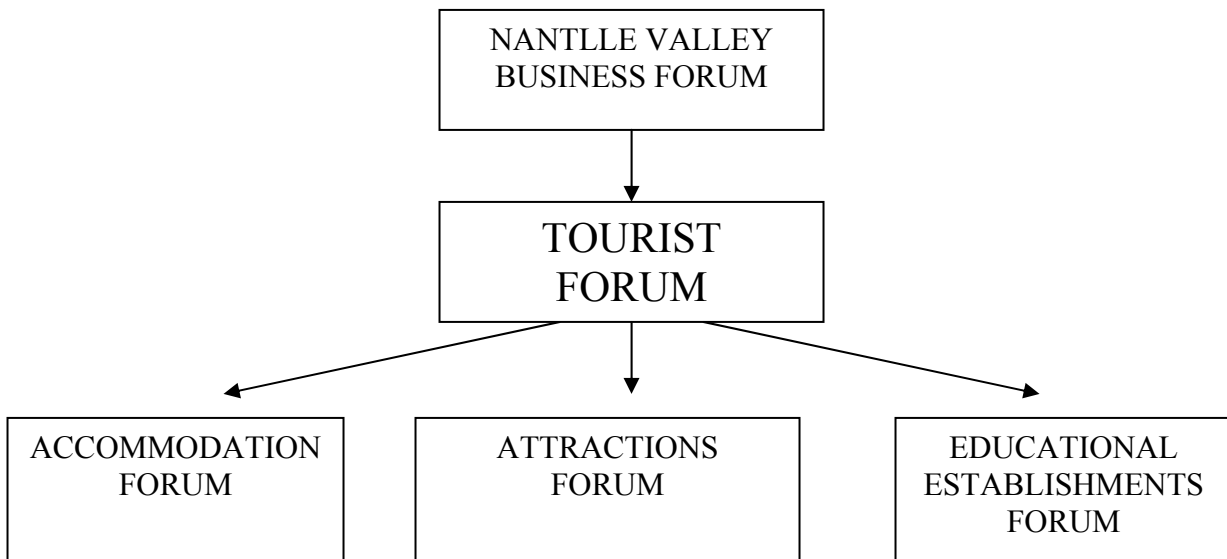
All of the above inspiring ideas have many aspects, which, we believe, would put the Nantlle Valley on the map and would attract many tourists into the area.

Section 6 – Recommendations for the Future and Funding Sources

6.1 Project 1 - Nantlle Valley Business Forum

Following the success of business forums in other areas, we feel that establishing some kind of forum in the Nantlle Valley for businesses is essential to develop the Valley's economy. This forum could be a general forum involving every business in the Valley, or a specific forum for the tourist industry; it would also be possible to form sub-forums to deal with the different aspects of tourism in the Valley. These sub-forums could meet less regularly than the main forums, so as not to take up too much of the members' time.

The pattern below could be used as a structure of the forums; as tourism is essentially a very diverse industry, the sub-forums could focus on the different aspects of tourism.



NANTLLE VALLEY BUSINESS FORUM

This forum could be the focal point for all the businesses in the Valley and could provide all the following objectives. It would not necessarily be specifically involved with the tourist industry, but the prosperity of all local businesses would be enhanced by the development of the tourist industry in the Valley.

- Sharing information.
- Sharing resources.
- Promote trust amongst companies.
- A forum where businesses could voice their concerns
- Cooperate to solve common problems
- An opportunity for companies to cooperate to develop events (e.g. late night Christmas shopping, shop window competitions, Christmas decorations etc.)
- Invite specialists to give information on specific business matters (e.g. grant applications, marketing, VAT, legal developments, insurance, etc.)

NANTLLE VALLEY TOURIST BUSINESSES FORUM

This forum could provide a specific focus for businesses in the tourist sector and would have a broader focus than the business forum. Hopefully it could provide the following benefits:

- Produce new ideas for improving the general provision for tourism in the Valley.
- Cooperate on marketing schemes to promote the Valley for tourists.
- Concentrate on solving specific problems facing the industry.
- Take advantage of the expertise of persons / agencies within tourism (e.g. Wales Tourist Board, Gwynedd Council Tourist Department, University of Wales' Tourism and Leisure Department; specialists from other areas – Llanberis Partnership etc.)
- Co-work to develop links with each other's websites.

ACCOMMODATION AND HOSPITALITY FORUM

This group would focus on:

- Sharing customers – develop a system to pass guests on to other businesses when their establishment is full.
- Share information on seasonal and general opening times, especially public houses, restaurants and hotels.

ATTRACTIONS FORUM

- Set up a customer-sharing network; arrange for bus companies to come to the attractions, offer discounts if visiting more than one attraction, co-ordinate visiting timetables with the bus companies.

- Co-ordinate visits to similar attractions; e.g. heritage centres in the Valley – offer comprehensive packages for school groups etc.

EDUCATIONAL ESTABLISHMENTS FORUM

- Deal with specific matters in this sector of the industry e.g. appoint qualified and experienced instructors, conforming with health and safety issues
- Sharing resources when dealing with large groups on courses etc.

We recommend that the groups meet initially once a month, then quarterly once the forums are established. Obviously, meeting mainly during the winter months would be more suitable for businesses. The forum would need a strong steering committee to form an effective and efficient working system, establishing this would be part of the responsibility of any tourism development officer working in the Valley.

Dangers when forming forums to deal with business problems are: -

- Lack of trust between those companies who refuse to cooperate.
- Many people eager to voice their opinions in meetings, especially in the beginning after years of working on their own and having developed strong opinions and prejudices
- Outcomes not identified, forum becomes a talking shop.
- Loss of interest over time, forum loses direction as has happened in several Chambers of trade.

These shortcomings can be avoided as long as the forum members have an open mind about its aims, if the forum has an effective chairperson and if there's a strong bond between the companies and a belief that the forum is there for the specific purpose of promoting tourism in the Valley.

6.2 Project 2 Tourism Development Officer

As a natural development to the forum project it's recommended that a tourism development officer be appointed for the Valley.

OBJECTIVES of the post

The development officer will contribute as follows-

- Develop networking among the existing businesses in the Valley.
- Encourage companies to seek public sector assistance.
- Develop marketing strategies to promote tourism in the Nantlle Valley
- Assist in the development of new enterprise.
- Lead an Events Development Programme in the Valley.

OFFICER'S DUTIES

- Promote cooperation between local companies in the tourist sector, as well as indigenous companies. Organising meetings of the tourism forums and implementing the forums' decisions from day to day.
- Be a link between the tourist establishments, other agencies and local businesses, this would entail visiting the companies to offer advice and answers as necessary.
- Direct companies towards public bodies that can provide them with practical and financial assistance. This would require awareness of all practical projects locally and knowledge of all available grants that existed.
- Take a leading role on the Valley's marketing strategy, releasing press statements about on going projects.
- Keep statistics and map the development of the local tourist industry. These can be used when applying for any public or private funding in the future as well as giving strong support to the continuation of any new schemes in the pipeline.
- Offer support to individuals or groups with new business ideas on the development of tourism, offer constructive feedback and advice to help develop their ideas.
- Assist in promoting present events in the Valley such as Gŵyl Fai Dyffryn Nantlle, Gŵyl Rhedyw, Talysarn Carnival and the Trigonos Healthy Food Scheme, as well as being involved in other events that would attract visitors to the Valley. This would involve cooperating with Gwynedd Council's Events Department; North Wales Events Commission as well as organisations like North Wales Film Commission to attract visitors.
- Be a point of contact for all tourist matters from the office.

THE OFFICER'S PROFILE

- The officer will have a thorough knowledge of the tourist industry, both local and further afield, preferably, with a suitable degree in tourism, leisure and/or marketing.
- A good local knowledge of the Nantlle Valley will be essential.
- An enthusiastic and energetic person who has experience of dealing with the public and public bodies.
- An inspirational leader to the tourism industry in the Nantlle Valley!
- The salary should be on a scale that is competitive with a similar post within the public sector, so as to attract suitable applicants for the post.
- The post initially could be part time, but it could be developed over time to be a sustainable post that receives private contribution as well as public funding.
- The business forums' volunteers' time could be used as match funding to assist in drawing grant funding to employ the officer.

6.3 Project 3 - Developing tourism links to the Nantlle Valley Website

By now the majority of businesses recognise the importance of having a website. It is a cost-effective way of marketing products and attracting new customers. Tourism businesses have benefited a great deal from using the Internet over the last few years. It enables tourists to get detailed information about the area's accommodation, attractions and local activities. What is vitally important when marketing on the Internet is to ensure an easy and quick access to the information required, and companies usually do this in two ways.

First of all the individual business creates its website giving all information about the attraction or accommodation, including booking details. The site ought to be simple with pictures showing exactly what they have to offer the customer. Web designers are available to construct the site or the company may use their own software.

The second method is to have a website for the whole area that has detailed information about the history, choice of accommodation available and attractions of the locality. This website should have a name that is easy to find for visitors surfing the Internet for information. A combination of both of the above would be ideal with the area's website having links to the individual websites.

When we examined other areas, (bordering the Nantlle Valley) which had been involved with the tourism trade for a long time, we saw that all had successful websites that was full of information for tourists.

These were: -

www.llanberis.org
www.beddgelerttourism.com
www.porthmadog.co.uk
www.pwllheli.org.uk

All of these are fairly new websites but we know that they are successful due to the number of hits recorded and businesses in the areas firmly believe that they attract more customers because of these websites. One hotel owner in Porthmadog remarked that they get 80% of their visitors from the website, visitors booked after seeing pictures of the hotel on the website. Another hotel owner in Llanberis said that 50% of his guests had booked on the Internet or had received information about the hotel from the website.

A community website www.nantlle.com was formed with the aid of the Social Risk Fund through the WCVA. The website is being developed and maintained by a group of volunteers training and working under the guidance of a tutor, the group receives financial support towards the training from the Talysarn and Nantlle Partnership through the Welsh Assembly Government's Communities First Programme. The website contains all the latest news from the local villages, this allows local groups and societies to share information about events. A section for local businesses is included that gives local companies an opportunity to advertise.

Up to now the website does not have a specific section for tourism but we believe that this should be considered, as we have seen in other areas, there has been real business potential in forming a special link for tourists. The main task would be to gather information about the businesses and present it in a practical and interesting manner. The site would have to be divided into different sectors such as accommodation, attractions and activities and present detailed information regarding connecting to other individual / business websites. Although the website at the moment is a community project, we consider that once the tourist web page is up and running that companies who wish to be part of the website should make a financial contribution towards the running cost of the site. This is already happening in other areas with the companies willing to contribute towards maintaining the website, because through it they get more customers. Businesses contribution could go towards the cost of photography, gathering information and designing of the web pages.

In addition to the specific business details it is also possible to provide information for tourists about activities such as walking and cycling and details about fishing sites or any historic or industrial remains. It is also possible to include details about the facilities in each village such as car parks, toilets, shops and places to eat. There are many possibilities and it is possible to constantly extend the website with more information.

6.4 Project 4 – Information Centre / Bunkhouse

As there is a no specific centre in the Nantlle Valley to focus on the tourist industry, we feel that investing in a tourist centre would give a focal point for the tourist industry locally. With the cooperation of the Valley's indigenous businesses it is possible to give the proposal a unique and Welsh image, emphasising the cultural identity of the Nantlle Valley.

A similar project in Trawsfynydd has been successful, where the enterprise 'Trawsnewid' had taken advantage of public and private funding to set up a centre that responds to the tourism sector local needs, which are similar to those in the Nantlle Valley, namely: -

- Lack of accommodation
- Lack of local cultural focus
- Lack of a tourist attraction situated where the whole community would benefit directly from its presence – in the centre of the village.

The Llys Ednowain Centre in Trawsfynydd offers accommodation in the form of a 'Bunkhouse' which consists of 24 beds; a museum that displays local history in an innovative and impressive style; an area that displays the work of local artists; a large screen showing old photos of the locality; and a multi purpose room to be used by the community.

The old village Co-op store was renovated for the scheme; in the first instance a donation of £40,000 was received from BNFL and NDA (Nuclear Decommissioning Agency) this was coupled with Objective 1 grants to pay for the project.

The centre has become an asset for numerous small local attractions such as 'Yr Ysgwrn' and the local church, who work together to attract Sunday school visits and pilgrims. They can also cope in a professional way with school trips ect:.

A similar centre would certainly be an asset to the Nantlle Valley for several reasons.

- Supply the obvious need for affordable accommodation for tourists.
- Enabling tourists to learn about the culture of the Nantlle Valley
- Draw tourists into the centre of the villages where they would possibly be spending in local shops, cafés and public houses.
- Enabling tourist to be integrated into local events and community groups by using the centre as a meeting place for local societies and clubs.
- Attracting tourists to participate in certain specialist activities that would benefit the local businesses e.g. cycling, diving, mountaineering, paragliding etc.
- Attracting AB1 social groups who would have enough spending money to spend locally.
- The centre would certainly create some direct and indirect jobs in the Valley.

The centre would have certain features: -

- 'Bunkhouse' accommodations, where beds with clean bed sheets are available at a cost of about £10 - £15 per night.
- A common room
- A small computer room or access to the World Wide Web.

- A small heritage display or museum depicting a brief history of the Valley, which could interest tourists to visit other cultural attractions such as Cae'r Gors or Canolfan Uwchgwyrfai heritage centres.
- A suitable room to keep bicycles safely.
- A suitable drying room for diving or mountain biking equipment.
- Access to compressed air machine for divers.
- A suitable room where meetings and classes may be held.
- A gallery or a display area.

The main problem would be the difficulty of attracting sufficient funding to cover the high costs of such a scheme if it was to be carried out effectively – Trawsfynydd were very fortunate in obtaining such large amounts from BNFL and NDA. Finding similar funding will be much more difficult for the Nantlle Valley.

6.5 Project 5 – Training

One of the most important factors when setting up any tourism business is finding suitable staff, ideally, all staff should be experienced and qualified in the tasks. But many companies have difficulty in getting the required experienced staff, many of the tourism businesses questioned in this survey had experienced difficulty in getting staff. Due to the work's seasonal nature it is regarded as work for students or those seeking part time occupation rather than as a career. The attitude of workers on the continent is completely different, there the tourism industry is regarded as a prosperous career.

For companies to obtain the staff they want, it is essential that proper training is made available. Many centres of education offer specific courses in leisure and tourism, with some courses available up to degree standard. Despite this there appears to be a demand for more vocational and specific training in certain sectors. It is vital that employers have an input into the type of training that is needed. According to a Careers Wales pamphlet the main skills that employers seek in tourism are: -

- Good communication skills
- Willingness to work flexible hours
- Good customer service skills
- Willingness to learn
- Information Technology

What are needed, therefore, are specialists training packages and it would be advantageous if trained specialists based the training locally. Careers Wales and North Wales Tourism Partnership are already responding to some of these demands by arranging workshops and specific packages in tourism. Careers Wales are also having regular discussions with employers, to find the skills shortages and to form a training strategy in cooperation with education partners. To find out what specific shortage worries the employers in the Nantlle Valley, a meeting should be held between employers and training specialists. This would present a clearer picture of which specific courses to hold in the area. Careers Wales are willing to be a part of any event.

We have discussed, in detail, the importance of the outdoor activity sector in this report but according to recent research by North Wales Outdoor Partnership, very few local people participate in the activities, and very few have qualifications as instructors. Statistics prove that only 4% of the instructors can speak Welsh. When considering that this sector contributes £140 million a year to the economy of Northwest Wales, it is essential that more local people be trained. The Outdoor Partnership has been funded for three years by the Welsh Assembly and employs 4 officers in the area. They are setting up local outdoor forums and trying to attract people to the appropriate courses. At present they are targeting youth in order to attract them to work in this sector. Some groups within the Nantlle Valley are benefiting with the 'Draenen y Nant' group from Talysarn and 'Mothers Climbing Walls' being established in Penygroes. Both groups are having training, which can help them to get work in this sector in the future. There are also youth services projects in which instructors are trained to give young people a taste of outdoor activity. We believe that these types of projects need to be promoted so that if a centre is developed within the Valley, then locally trained people will be available to work there.

6.6 Project 6 – Branding and the Mabinogion

There has been a significant increase in cultural tourism in recent years. Wales Tourist Board has formed many regional and national strategies including Wales Tourist Board's Cultural and General Strategy for 2000 – 2010. The Welsh Assembly Government also has a Culture and Economic Development Strategy. Their purpose is to look at the tourism industry from a sustainable aspect by attracting visitors who want to learn about the culture and history of the areas. Wales possesses a wealth of culture and history; this type of tourism can involve numerous sustainable elements including language, culture and the history of the area.

This leads to the branding of areas that specialise in special cultural elements. This has emerged in many areas in England; Skipton in Yorkshire has a 'Herriot Country' brand; the Lake District is connected with Beatrix Potter; and Dorset with Thomas Hardy. According to Wales Tourist Board's 'Tourism Strategy for Wales' there are two features to the branding of areas; 'culture and unique heritage' and 'myths and legends'. As the Nantlle Valley is one of the wealthiest areas of Wales with its myths and legends, including the tales of the Mabinogion in Caer Arianrhod, Dinas Dinlle and also the Nantlle Lake which derives its name from Llew Llaw Gyffes who landed there in the form of an eagle. Promoting this aspect of our culture could bring more tourists into the Nantlle Valley..

It would be possible to brand the Valley as 'The Valley of the Mabinogion' in many ways including

- Placing signs on the entrance to the area that promotes the concept that the Valley has a central role in the tales of the Mabinogion. These would give tourist a reason to stop and learn more about the Valley.
- Erect signs and information boards at the main places in the Valley that are connected to the legends.
- Create walking routes to follow the tales of the Mabinogion.

- Pool resources with other cultural attractions to form various packages for organisations that wish to visit the Valley.
- Assist with the schemes at Glynllifon Park, this could be a gateway to the area, by using the resources already there such as the gallery, café and shop, information could be placed there about the tales of the Mabinogion, where to go locally and what else can be seen in the area.
- Arrange events and activities that would emphasise the Nantlle Valley's community's pride in our heritage and the Mabinogion – an annual Mabinogion cultural festival or equivalent that would raise national awareness to the Valley's identity brand, attracting tourists to the area in its wake.
- Include this within Project 4 by presenting a display at the information centre about the Mabinogion.

This scheme would present many benefits to the Nantlle Valley –

- An opportunity for tourists to stop on their journey through the Valley by being curious to learn more about them.
- Attracting large numbers of tourists from educational establishments to visit the heritage centres.
- Attract tourist of the AB1 social classes who are most likely to spend in the area respecting our culture and supporting the tourist industry in a sustainable manner.
- Give the Valley an identity as other areas have like Pwllheli, Llanberis and Caernarfon, so as to make it easier to market in its entirety.
- It would be reasonably inexpensive to operate and could be developed over a period of years in cooperation with other attractions.
- It would raise awareness within the Valley itself of our legends, thus making our youth proud of their heritage.

6.7 The Development of the Dorothea Site

It is well known that the Dorothea site has been a contentious planning issue for the last few years and still continues to be. Despite this it appears that every one in the Valley has an opinion on what should be done to the site. When the local businesses were questioned almost all of them had a definite opinion on the development of the site.

Unfortunately, at present there are still doubts about the ownership of the quarry and all plans are hypothetical until the question of ownership has been settled, it is also true to say that it is the owner who will have the last word on whatever development takes place. Despite all this, it is true to say that Dorothea Quarry is the main tourist attraction in the upper part of the Nantlle Valley, it attracts thousands there every year for diving and walking. Regrettably, when the divers who use the quarry were questioned, it was found that the Valley gets very few benefits from their visits.

The prospective projects for Dorothea can be divided into 5 categories. These are the suggestions raised from the questionnaire.

Short Term Projects.

These could be projects that would initiate the process of getting the divers who come to Dorothea, to spend their money in the Valley. These projects would be entirely at the site owner's discretion.

A unit to provide refreshments for the divers could be one resource, as at present they all bring their own food with them, not spending in the Valley.

Many of the divers see an immense need for a local supplier of compressed air – this would save them having to travel 20 – 30 miles to refill their air tanks.

Heritage Projects

Although extensive efforts have been made over the years to maintain the quarry's architectural and engineering heritage, there is concern that many buildings of historical value are under threat due to the insecurity of the site's future. The projects vary from improving the maintenance to the quarry buildings: to restoring the beam engine as an attraction; to erecting a slate museum similar to the one in Llanberis; any of these developments could be developed concurrently with other ongoing projects.

Environmental Projects

These projects relate to the development of Dorothea as a country park. This could also run concurrently with the development of Dorothea as a diving or heritage centre. This could be a part of a more extensive development that could include Gloddfa Glai Quarry or Llyn Nantlle Isaf.

Developing Dorothea as a Diving Centre.

This is the most obvious development for the quarry when considering the use that is made of the site at present. Such project could involve diving tuition, a residential centre, diving restrictions to prevent accidents, a hyper baric chamber (to treat divers who suffer from the 'bends' - Nitrogen Narcosis); or a diving information centre.

Important Attractions in Dorothea

The research of the tourism businesses reveals that a prominent tourism development project in Dorothea would be welcomed. This hypothetical question was included in the questionnaires as there had been much publicity in the press to the proposed developments at Glyn Rhonwy, Llanberis. The question referred to a development that would employ 3300 or more people. The general feeling was that such a development would give a significant boost to the tourist industry in the Valley as well as to the

indigenous businesses. Such development could give a focus to the whole Valley, not just only to the tourism sector.

6.8 Project 8 – Development of Outdoor Activities

Cycling

Cycling is considered to be one of the main activities in keeping fit and it is also a sustainable method of transport. The Nantlle Valley has one of the first purpose built cycle paths in Wales – Lôn Eifion. It was adopted as a cycle path in the 80s when it stopped being a lorry route. Originally it went from Pantglas to Llanwnda but has now been extended so that it goes from Bryncir to Caernarfon. It is a part of the national ‘Lôn Las Cymru’ cycle path network. That means that it can be used as part of a longer trans-Wales journey.

Discussions have been held to open a new link from Lôn Eifion up the Nantlle Valley. There is already an existing path as far as Nantlle along the old railway track from Penygroes to Nantlle through Dorothea Quarry. We also believe that consideration could be given to the possibility of this path being extended as far as Rhyd Ddu. This would give access to cyclists to some of the most beautiful scenery and a link to some of the other attractions in Snowdonia. It would be possible to combine cycling with a train journey from Caernarfon and that would attract more tourists into the Nantlle Valley.

During the last year the Cycle Wales Company has been established in Talysarn, specialising in various aspects of cycling. It sells and repairs bicycles and is one of the main centres for cycling tuition. The company also provides cycling holidays in the area. Its most prosperous activity at the moment is tuition with courses being held every month. They provide various courses from 1 to 10 days with the courses structured to suit customer demand. They are very popular and attended by people from every part of Britain.

Customers have a choice of three types of cycling tours; One-day tours, Cycling Centre day tours and Multi Centre cycling tours. The day tours are available for tourists and local residents and are arranged according to the cyclists’ experience. The tours from a Cycling Centre involve the cyclists staying over at a centre and are guided on different daily journeys and returning to the same centre. The multi centre tours provide journeys for cyclists from one region to another, staying for one or more nights at different centres with their baggage being transported on ahead for them. Cycle Wales admit that they haven’t done any marketing of these tours so far, but we believe that the Nantlle Valley has great potential to expand this sort of service. One obvious hindrance to this cycling venture is the lack of accommodation suitable for cyclists. Not one place of accommodation specialises in offering accommodation for cyclists, these facilities would have a dry clothes room and a secure shed for the bicycles. According to Dewi Jones, proprietor of Cycle Wales, it would be advantageous for the Nantlle Valley if a hotel or a hostel was established specialising in offering services to cyclists. At present the Nantlle

Vale Hotel is up for sale and we believe that a group or local individuals should examine the possibility of attracting public or private funds to convert it into a purposeful accommodation for cyclists and other tourists.

Another aspect of cycling that should be examined is 'mountain biking'. Cycle Wales's proprietor suggests that Dorothea would be a suitable site for 'cycle cross'. This activity is a combination of mountain and track cycling and is increasing in popularity. More detailed research is required before progressing, so as to avoid the possibility of duplicating schemes that already exist in the area such as in Coed y Brenin, also there are plans to create a mountain biking centre at Glyn Rhonwy, Llanberis.

The company have numerous projects in the pipeline and local groups are eager to promote cycling in the Nantlle Valley.

4x4 Vehicles and Motorcycles

This is another activity that is growing in popularity with much purpose built tracks available here and there. There is no suitable track in the Nantlle Valley at the present time but a group named 'Muddy Muckers' has been formed. This group of young people hope to find a suitable site for trail and quad bikes. A few individuals have been using a site at Dorothea but due to ownership problems it is not very adequate and it would be near impossible to acquire appropriate insurance. Discussions are being held at present to find a suitable site in the area, this is important because many cyclists are illegally using certain sites. This activity deserves some consideration as a tourist attraction, but it is vital that it is properly controlled under proper health and safety regulations.

Canoeing

This is a very popular outdoor activity but a very sensitive one in this area. Certain altercations have happened between canoeing clubs and the local fishing association who hold user rights on the rivers. But we believe that, by cooperation, it is possible to reach some form of compromise where canoeing and fishing may coexist on our lakes and rivers. Ways have to be found so that canoeing does not affect the fisheries, also that canoeist contribute financially and practically towards river maintenance. If a compromise is reached then Llyn Nantlle and perhaps a part of the river Llyfni could be marketed for canoeing use. It may be possible for a local group in the Nantlle area to offer specialist help and equipment hire.

Paragliding Partnerships.

This is a scheme that will be a partnership between local farmers who wish to diversify into the tourism market and local paragliding clubs. The scheme would assist Para gliders to gain access to suitable launching sites on mountainsides in cooperation with local farmers who could transport them with four wheeled drive vehicles or quad bikes.

Benefits for the farmers

- Financial advantages – Para gliders would be willing to pay £5 - £10 each for transport to suitable launching sites on the mountainsides.
- This business would take place in summer - a time of less activity for many hill farms.
- The farmers will have more control over who use their land for paragliding than they do at present under the laws of ‘right to roam’.
- They may be able to promote their existing camping sites to more specialised markets.

Benefits for the Paragliders

- Save hours in carrying a heavy paragliding canopy up the mountainsides
- Form a good relationship with the farmers, which is presently rather strained as the farmers get no financial gain from their presence.
- Developing new paragliding sites different to those being used at present.

Benefits to the economy

- Money coming into the area from the Paragliders to the farmers.
- More tourists coming to the area with the potential that they will spend more here.
- The possibility of creating a part time post.
- Developing the Valley for the specialist outdoor activity market.

Such a scheme could be developed in more ways than one –

1. A private venture by a farmer whereby a Para glider visits the farm and pays to be transported to the launching site.
2. A partnership between a farmer and paragliding clubs that would enable them to book before hand for group visits and who would pay for transportation to the launching sites.
3. Individuals paying local farmers for permission to carry Paragliders to the launching sites, running a paragliding company who would possibly benefit by forming special contracts with farmers.

There is a possibility that, in future, the scheme could develop into forming a paragliding centre, but many factors have to be considered such as training and insurance.

Contacting local paragliding clubs could be a good starting point to find sites in the Valley suitable for paragliding.

6.9 Project 9 – Art Centre.

There was such a scheme in the area some time ago; it is felt that re-establishing a similar project could attract tourists to one of the most beautiful North Wales' Valley. Consideration could be given to establishing a residential art centre in a partnership with other tourism ventures, e.g. heritage or outdoor activities.

Such a centre could offer various residential and day courses in many art forms, giving artists the opportunity to work at different sites in Gwynedd and Anglesey, using the Nantlle Valley as a base. Perhaps the way forward is to establish such a centre in partnership with public educational and artistic bodies.

This sort of scheme could run hand in hand with the present projects at 'Barics', Nantlle, because many of the present tenants have artistic products. Canolfan Llys Llywelyn Centre could be a useful part of the scheme. Many other local clubs have been set up recently like the Hobbies Club and the camera Club. It is possible to exhibit members' works where they have the opportunity to sell their wares on a broader level. The Trigonos Centre already offers specialised courses in art and perhaps developing this service could be considered by working together with local groups to promote the area to attract more visitors specialising in the arts.

Benefits to Tourists

- A centre specialising in art offering an ideal creative environment.
- A central base between Snowdonia and the sea.
- Courses offering tuition in many forms of art.
- Advantage of local workers who have a vast knowledge of the area.

Benefits to such a centre

- Attract tourists who would be willing to pay a premium for a course in an excellent centre, situated in an ideal location.
- Have contacts with education authorities and public artistic organisations that could provide the centre with business at off-peak periods.

Benefits to the local economy.

- Creating well paid all year posts for tutors and managers as well as other seasonal posts.
- Establishing the Nantlle Valley as a specialist market for artists ect.
- Attract visitors to the centre who would also spend in other establishment as well.

6.10 Project 10 – Environmental Tourism.

We have already discussed in detail in the report that the Nantlle Valley has some of the best natural elements to attract tourists. We have also discussed the importance of outdoor activities to the sector. But some local individuals are discussing one different and innovative suggestion and that is to offer holidays with an educational slant. The notion is to provide environmental courses in the area. The term used for these types of courses is ‘permaculture’. It is a form of providing courses for tourists and local residents in safeguarding the environment and improving the appearance of the area at the same time. Different aspects could involve preservation, agriculture, forestry and cultural history. It is possible for individuals to gain recognised qualifications on these courses, which can be held in either English or Welsh. The Welsh language course for learners can be counted as an added skill. Courses can be arranged varying in length and content but would have an aspect of sustainable development. This is a notion that merits consideration as it is gaining popularity all over the world.

6.11 Local Produce Market

The popularity of the concept of a local produce market is increasing; this is because of the interest in sustainable living and the need to lessen the effect on the environment. Discussions are being held locally to establish a local food market and in April 2006 a report ‘A Feasibility Study on a Food Project in the Nantlle Valley’ was launched. It discusses the notion of establishing a local food market or a mobile shop. Existing local producers would supply the market and perhaps encourage more local producers. It suggests that the market could also supply the local schools.

The main produce would be fruits and vegetables, lamb and beef products, bread and cakes. Groups like Llysiâu Lleu, Bwyd Iach Trigonos Healthy Food and numerous farms already sell locally. By forming a local market this would not only provide a service to the local residents but could also be a tourist attraction. Care must be taken to avoid a negative effect on other retail outlets, but we believe that with cooperation, this could be an added new asset to the area.

Table showing Importance of The Projects

	Project	Responsibility For Establishing	Time for Establishing	Possible funding sources	Cost
1	Business Forums	Existing establishments in the Nantlle Valley	Short Term	Antur Nantlle; Talysarn and Nantlle Partnership; Private	Low
2	Businesses Development Officer	Antur Nantlle, Talysarn and Nantlle Partnership, Prospective Forums	Short Term	Gwynedd Council; Objective 1 Funding Convergence Trust Fund	Medium
3	Develop a tourist link to Nantlle.com	Antur Nantlle, Talysarn and Nantlle Partnership – The Prospective Forums	Short Term	Private Funding (Promotional Funds of Tourism Companies), Public Funding	Low
4	Information Centre	Business Forums; Talysarn and Nantlle Partnership; Antur Nantlle; Local Councils; Tourism sector bodies; Partnerships in the private sector.	Middle to Long Term	Objective 1 funding Convergence; Gwynedd Rural Fund; Interreg European Funding; Big Lottery Fund; Wales Tourist Board; WDA; Private Funding	High

	Project	Responsibility For Establishing	Time for Establishing	Possible funding sources	Cost
5	Training	Forums; Private Companies including Educational centres in the Valley; Antur Nantlle	Middle Term	Careers Wales; Partneriaeth Twristiaeth Gogledd Cymru; Sector Breifat	Medium
6	Branding and Mabinogion	Antur Nantlle; Talysarn and Nantlle Partnership; Business Forums; Tourism Development Officer; Gwynedd Council; Wales Tourist Board;	Middle Term	Gwynedd Council; Objective 1 Convergence; Interreg IIIA European Fund; Wales Tourist Board; WDA; Lottery Heritage Fund; Big Lottery Grant; Communities First	Medium
7	Dorothea Quarry projects	Private / Voluntary / Public	Long Term	Varying from scheme to scheme – future of quarry's status unsure	Medium
8	Developing Outdoor Activities	Private; Partnerships between various groups	Middle Term	Varying from scheme to scheme	Low to High
9	Arts Centre	Public and Private Partnerships	Middle Term	Dependent on the nature of the schemes established	High

Section 7 – Conclusions

The main conclusion following the research is that tourism is of paramount importance on a national and local level. It is one of the few growing sectors of the economy. But, unfortunately, the Nantlle Valley does not appear to be fulfilling its potential as a tourist centre. It has so much to offer with its many assets in natural resources and as an area of outstanding beauty on the outskirts of Snowdonia and the Caernarfonshire coastline. It became evident during local discussions that the Valley had not much history in establishing tourist businesses, this coupled with lack of information and finance was especially evident when compared to areas like Beddgelert and Llanberis who have a strong history and tradition in the trade.

In order to change the situation, strong recommendations have been included in the report. Some are very innovative but the main principle behind all the suggestions is that there is a need for an effective local structure to formulate discussion. Ways will have to be sought to make tourism work for the Valley and for its businesses to prosper. Expert advice is required on public funding sources. In our opinion it is very important that any development whether large or small in the Valley does not depend only on investments by National Companies, as often small and family run businesses can be more beneficial to the area in the long term.

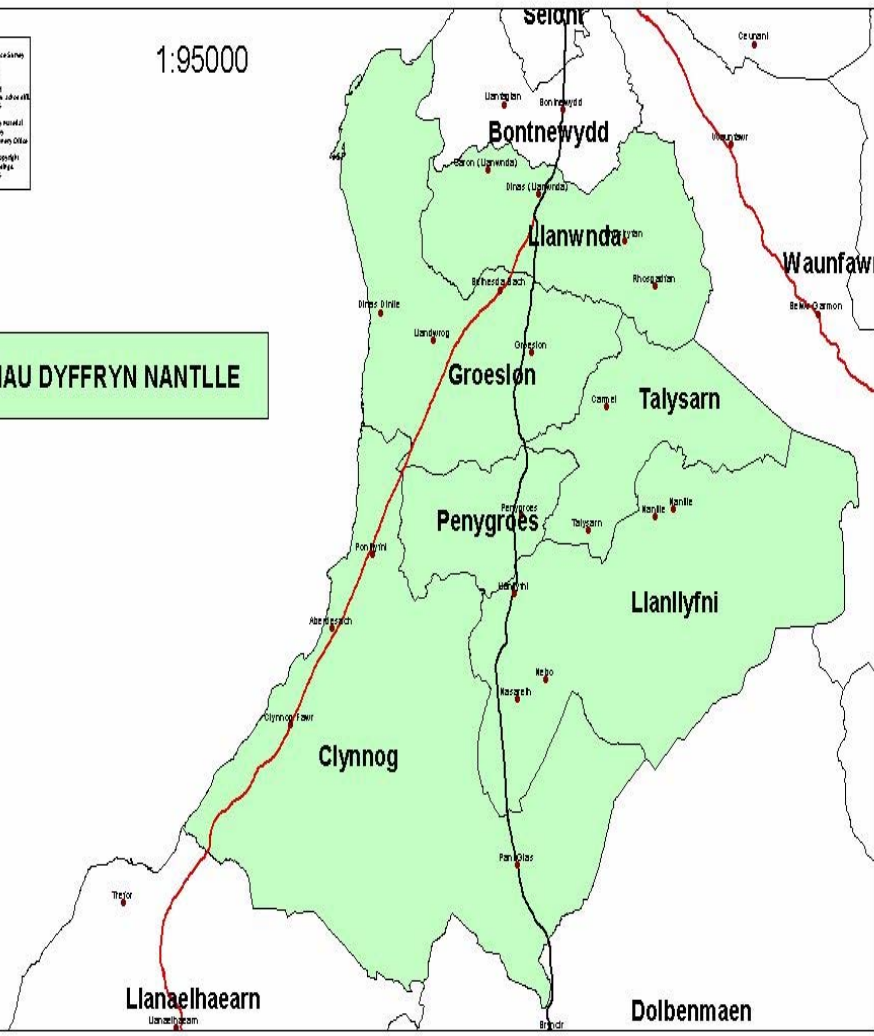
Appendices

- 1. Map, of the Nantlle Valley region.**
- 2. List of Contributors**
- 3. Questionnaire Analysis.**

Datgwybodaeth ynghyd â chwyddiadau o'r Cymunedau
 a'r Wardiau Dyffryn Nantlle
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WARDIAU DYFFRYN NANTLLE



CONTRIBUTORS TO THE REPORT

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Dewi Jones	-	Cycle Wales
Elliw Ellis-Davies	-	ATOM (PR) Cyf
Fiona Williams,	-	Careers Wales
Huw Huws	-	Seiont Gwyrfai Llyfni Fishing Association
Huw Percy	-	Snowdonia Green Key
Kelvin Roberts	-	Nantlle/Gwyrfai Regeneration Officer, Gwynedd Council
Margaret Shakespeare		
Mark Jones		North West Wales Open Air Partnership
Snowdonia National Park		

TOURISM PROVIDERS QUESTIONED

Y Beuno	-	Clynnog Fawr
Bryn Eisteddfod	-	Clynnog Fawr
Bryn y Môr	-	Dinas Dinlle
Tanrallt Mountaineering Centre	-	Tanrallt
Ozaman Centre	-	Tanrallt
Cwellyn Arms	-	Rhyd Ddu
Seiont, Gwyrfai, Llyfni Fishing Association		
Snowdonia Green Key Scheme		
Fron Dirion	-	Brynaerau, Pontllyfni
Inigo Jones	-	Groeslon
Lleuar Fawr	-	Llanllyfni
Lynn R Papercrafts	-	Penygroes

Caernarfon Bay Caravan Park	-	Dinas Dinlle
Dinlle Caravan Park	-	Dinas Dinlle
Llyn y Gele Caravan Park	-	Pontllyfni
Morfa Lodge Caravan Park	-	Dinas Dinlle
Glynllifon Country Park	-	Llandwrog
QDI Aviation		
Caernarfon Airport,	-	Dinas Dinlle
Railways Unlimited / Railway Research Centre	-	Y Barics, Nantlle
Stables	-	Llanwnda
Talymignedd	-	Nantlle
Trigonos	-	Plas Baladeulyn, Nantlle
Tŷ Gwyn	-	Llanllyfni
Ty'n Llan	-	Llandwrog
Tŷ Mawr Guest House	-	Rhyd Ddu

INDIGENOUS BUSINESSES QUESTIONED (i.e. businesses not entirely dependent on tourism)

Co-op	-	Penygroes
Povey's Garage	-	Penygroes
Homestyle Bakery	-	Penygroes
Y Quarry	-	Llanllyfni
Spar	-	Penygroes
Siop Campbell	-	Carmel

Siop Parry a Jones	-	Penygroes
Penygroes Post Office	-	Penygroes
Talysarn Post Office	-	Talysarn
Pennionyn (Llanfair Arms)	-	Groeslon

ESTABLISHMENTS IN OTHER AREAS QUESTIONED

Big Rock Hotel	-	Porthmadog
Black Boy	-	Caernarfon
Cofi Roc	-	Caernarfon
Llanberis Businesses Consortium	-	Llanberis
Co-op	-	Pwllheli
Emrys House	-	Beddgelert
Gegin Gefn	-	Porthmadog
Gwalia Cafe	-	Pwllheli
Dolbadarn Hotel	-	Llanberis
Heights Hotel	-	Llanberis
Macsen	-	Caernarfon
Penlan Fawr	-	Pwllheli
Pete's Eats	-	Llanberis

Prosiect Llanberis	-	Llanberis
Queen's	-	Porthmadog
Royal Goat	-	Beddgelert
Spar	-	Caernarfon
Spar	-	Llanberis
Spar	-	Porthmadog
Post Office	-	Beddgelert
Post Office	-	Caernarfon
Post Office	-	Llanberis
Post Office	-	Porthmadog
Post Office	-	Pwllheli
Tanronnen	-	Beddgelert
Tower Hotel	-	Pwllheli

CONTRIBUTIONS BY PROSPECTIVE FUTURE DEVELOPMENTS

Bunkhouse Seiont, Gwyrfai, Llyfni Fishing Association

Pontllyfni

Talysarn Community Centre Café

Talysarn

Kate Roberts Heritage Centre

Rhosgadfan

Canolfan Uwchgwyrfai (Heritage Centre)

Clynnog Fawr

Gloddfa Glai Camping Site

Talysarn

Mrs F. L. Jones (Archery Centre)

Nebo

Penyrsedd Engineering School

Nantlle

SUMMARY OF ANALYSIS OF QUESTIONNAIRE TO TOURISM BUSINESS PROVIDERS IN THE NANTLLE VALLEY

8.1 NUMBER EMPLOYED

	NUMBER	PART TIME	FULL TIME
CAMPING / CARAVAN PARKS	5*	10	32
HOTELS	4	19	16
TAVERNS (offering accommodation)	2	6	15
B&Bs & GUESTHOUSES	3	3	4
HOLIDAY COTTAGES	1	2	
EDUCATIONAL CENTRES	3	7	22
ATTRACTIONS	3	12	14
SPECIALIST VENDORS	2	3	2
TOTAL	23	67	105

*There are 2 other caravan parks in the Valley that were not part of the survey.

PROSPECTIVE SCHEMES

FL JONES (ARCHERY)
 PENYRORSEDD ENGINEERING SCHOOL
 CANOLFAN UWCHGWYRFAI
 KATE ROBERTS HERITAGE CENTRE
 'BUNKHOUSE' SEIONT, GWYRFAI & LLYFNI FISHING ASSOCIATION

8.2 TURNOVER

< £10,000	1
£10,000 - £50,000	5
£50,000 - £100,000	5
£100,00 - £250,000	3
>£250,000	4
Not yet known	5

8.3 TURNOVER BY EACH SECTOR

	<£10k	£10k – £50k	£50k - £100k	£100k – £250k	>£250k	Not known
CAMPING		2			2	1
HOTELS			3			1
PUBLIC HOUSES				1		1
B&Bs G/HOUSES	1	1				1
COTTAGES		1				
EDUCATIONAL		2		1		
ATTRACTIONS				1	2	
VENDORS		1	1			

8.4 AVERAGE LIFE OF BUSINESSES (IN YEARS)

CARAVANS	-	36.8
HOTELS	-	7.25
PUBLIC HOUSES	-	18
B&Bs / G/HOUSES	-	7.33
COTTAGES	-	7
EDUCATIONAL	-	11.3
ATTRACTIONS	-	63
VENDORS	-	5

AVERAGE – 22 years and 7 months

8.5 NUMBER OF BEDS PROVIDED

BEDS IN HOTELS	-	99
BEDS IN PUBLIC HOUSES	-	7
BEDS IN B&Bs	-	14
BEDS IN COTTAGES	-	50
BEDS IN BUNKHOUSES	-	23
BEDS IN EDUCATIONAL CENTRES	-	121
STATIC CARAVAN SITES	-	212
TOURER CARAVAN SITES	-	196

* Including Morfa Lodge, Dinas Dinlle which is the biggest caravan site in the Nantlle Valley

8.6 REASONS FOR COMING TO THE VALLEY

BEACH
 WALKING
 CENTRAL POSITION
 RURAL AREA
 DIVING
 TRANQUILITY
 QUALITY OF THE ACCOMMODATION
 CYCLING
 MOTOR CYCLING
 SNOWDONIA RAILWAY
 FISHING
 COURSES
 CULTURE
 WILD LIFE

8.7 NUMBER OF TOURISTS RETURNING

HOTELS	40%; 40%	= 40%
PUBLIC HOUSES	30%; 60%	= 45%
B&Bs	10%; 80%; 37%	= 42.3%
COTTAGES	20%	= 20%
EDUCATIONAL CENTRES	95%; 100%; 95%	= 96.6%
CARAVAN PARKS	80%; 35%; 75%; 60%	= 62.5%
ATTRACTIONS	60%; 60%; 98%	= 72.6%

TOTAL AVERAGE RETURNING 55.57%

**This figure is rather misleading as these centres include large companies and public bodies as clientele who do not necessarily return to the educational centres with the same people. By not including the figures for the educational centres the total is 48.73% of customers returning to the same providers in the Valley.*

8.8 GROWTH / DECLINE IN THE TRADE

	GROWTH	DECLINE	SAME
HOTELS	3		1
PUBLIC HOUSES	1	1	
B&Bs	1		2
COTTAGES	1		
EDUCATIONAL CENTRES	2	1	
CARAVAN PARKS	4	1	
ATTRACTIONS	4	1	
TOTAL	16	4	3
PERCENTAGE	69.50%	17.33%	13.00%

8.9 REASONS FOR GROWTH IN THE TRADE

PEOPLE HAVING HOLIDAYS MORE OFTEN –GROWTH IN SHORT HOLIDAYS
FOREIGN TRAVEL IS MORE EXPENSIVE
GROWTH IN CAMPING DUE TO EXPENSIVE HOTEL COSTS
DINAS DINLLE BEACH HAS A BLUE FLAG
COMPANY OFFERING A BETTER SERVICE
MORE MAKING ARRANGEMENTS ON THE INTERNET
MARKETING IS EASIER ON THE INTERNET
INCREASE IN VARIETY OF LOCAL ATTRACTIONS
PEOPLE MORE AWARE OF HEALTHIER LIVING – MORE OUTDOORS HOLIDAYS
GOOD REPUTATION WITHIN THE INDUSTRY
MORE SPENDING MONEY AVAILABLE
ROADS HAVE BEEN IMPROVED
SPECIALISATION IN A PARTICULAR MARKET

8.10 REASONS FOR DECLINE IN THE TRADE

CHEAP FOREIGN HOLIDAYS
VILLAGES DETERIORATING
POOR MAINTENANCE
HIGH PRICE OF PETROL
STRINGENT HEALTH AND SAFETY REGULATIONS (OZANAM CENTRE)

8.11 BUSINESSES BENEFITTING FROM PUBLIC SUPPORT

	BENEFITTED	NOT BENEFITTED
FINANCIAL SUPPORT	7 (33%)	14 (66%)
PRACTICAL SUPPORT	6 (29%)	15 (71%)

8.12 REASONS FOR NOT APPLYING FOR GRANTS

DID NOT ENQUIRE
DID NOT RECEIVED
TOO MUCH WORK
TAKING TOO LONG
AGAINST BUSINESS PRINCIPLES

8.13 COMPANIES COOPERATING WITHIN THE SECTOR

COOPERATING	12	52%
NOT COOPERATING	11	48%

8.14 COMPANIES BELIEVING COOPERATION WOULD BE BENEFICIAL

BENEFICIAL	18	
NOT BENEFICIAL	1	
DON'T KNOW	4	

8.15 MARKETING METHODS

OWN WEBSITE	16	69%
ADVERTISING IN THE PRESS	7	30%
TOURIST BOARDS	7	30%
PAMPHLETS	5	22%
SNOWDONIA MOUNTAIN AND COAST	4	17%
AGENCIES	3	13%
OTHER PERSONS' WEBSITES	3	13%
DIRECT MARKETING	3	13%
AA / RAC	1	4%
NO MARKETING	1	4%

8.16 WOULD YOU WELCOME A MARKETING STRATEGY FOR THE VALLEY

YES	22	96%
NOT CONCERNED	1	4%

8.17 TYPES OF MARKETING METHODS SUGGESTED

WEBSITE
PAMPHLETS; BROCHURES
USING THE QUARRY AS A MARKETING FOCUS
MARKETING THE HISTORY AND CULTURE OF THE VALLEY
PROMOTE THE USE OF THE BROWN SIGNS

8.18 WHAT ARE THE HINDRANCES TO THE GROWTH OF TOURISM

SHORT TERM

VILLAGES APPEAR UNTIDY	-	(5)
LACK OF PLACES TO EAT IN THE VALLEY	-	(4)
LACK OF ACCOMMODATION	-	(2)
BROWN SIGNS POLICY	-	(2)
NO PROVISION FOR CHILDREN	-	(1)
RESTRICTION OF CAMPING SEASON	-	(1)
DINAS DINLLE TERMED COASTAL FLOODING AREA	-	(1)
UNAVAILABILITY OF TRAINED STAFF	-	(1)
POLICING	-	(1)
PARKING	-	(1)
PRICE OF ATTRACTIONS FOR TOURISTS	-	(1)
LACK OF ACCESS TO AREAS (e.g. Lakes)	-	(1)
LACK OF REASONS FOR TOURISTS TO STOP IN THE AREA-	-	(1)
LACK OF COOPERATION	-	(1)

MIDDLE / LONG TERM

LACK OF A MAJOR ATTRACTION	-	(8)
PUBLIC TRANSPORT	-	(5)
PLANNING POLICIES / THE COUNCIL	-	(5)
MARKETING	-	(2)

8.19 BUSINESS OUTLOOKS

GOOD	17	73%
REMAINING AS IT IS	5	23%
DECLINING	1	4%

8.20 WOULD YOU WELCOME A SUBSTANTIAL DEVELOPMENT IN THE VALLEY?

YES	16	69%
NO	2	8%
DEPENDING ON THE SCHEME	5	23%

8.21 OPINIONS ON THE TOURIST INDUSTRY IN THE VALLEY

POSITIVE

THE VALLEY HAS PLENTY TO OFFER	-	(1)
GOOD COOPERATION IN THE VALLEY	-	(2)
PROSPECTIVE ATTRACTIONS APPEAR PROMISING	-	(1)

NEGATIVE

POOR COMPARED TO OTHER AREAS	-	(3)
LACK OF ATTRACTIONS	-	(8)
LACK OF DEVELOPMENT	-	(5)
NO EVENTS	-	(2)
DIFFICULT TO RUN A BUSINESS HERE	-	(1)
TOO MANY SHOPS HAVE CLOSED	-	(1)

SUMMARY AND ANALYSIS OF QUESTIONNAIRE TO PROVIDERS IN OTHER AREAS

CAERNARFON

9.1 NUMBER EMPLOYED

FULL TIME	29	AVERAGE	-	5.8
PART TIME	25*	AVERAGE	-	6.25*

(In the 5 Establishments)

*Information on only 4 establishments

9.2 AVERAGE OF BUSINESS DERIVED FROM TOURISM (Estimate)

43%

9.3 AVERAGE OF SEASONAL VARIANCE IN TURNOVER (Estimate)

+74% In the Holiday Season

Not much information was received about variety in staff as the number of staff often remains the same but there is an increase in the working hours.

9.4 GROWTH / DECLINE IN THE TRADE

GROWTH – 2 SAME – 2 DECLINE - 1

9.5 HAS THE TOURIST MARKET BEEN FULLY DEVELOPED IN CAERNARFON?

NO - 4/5 (80%) YES - 1/5 (20%)

9.6 TO WHAT EXTENT DO YOU COOPERATE WITH OTHER COMPANIES?

NONE - 2 (40%) A LITTLE - 3 (60%) A GREAT DEAL - 0

9.7 WHAT ORGANISATIONS EXIST TO ENABLE COOPERATION WITH OTHER BUSINESSES?

CAERNARFON CHAMBER OF TRADE

9.8 NUMBERS QUESTIONED WHO WERE MEMBERS OF THE CHAMBER OF TRADE

1/5 (20%)

9.9 COULD MORE COOPERATION BE BENEFICIAL?

CERTAINLY - 3 NOT SURE - 1 NO - 1

9.10 PRESENT MARKETING METHODS

Websites	-	(4)
Advertising in magazines	-	(1)
Advertising in 'brochures'	-	(1)
Corporate advertising	-	(1)
Advertising as a national company	-	(1)
Yellow Pages	-	(1)

9.11 CONSIDERED HINDRANCES TO THE TOURIST TRADE

Lack of building maintenance	-	(2)
Not enough events	-	(1)
Lack of investment	-	(2)
Brown Signs	-	(1)
Lack of good quality shops	-	(1)
Lack of Public Support	-	(1)

9.12 BUSINESS OUTLOOKS

GOOD - 4 UNSURE - 1 POOR - 0

9.13 GENERAL REACTION TO THE TOURIST INDUSTRY IN CAERNARFON

Very good	-	(1)
Not enough events	-	(2)
In decline over the years	-	(1)
Needs improving	-	(1)
Too dependent on the castle	-	(1)
More information needed about Local events	-	(1)

LLANBERIS

9.14 NUMBER EMPLOYED

FULL TIME	22	AVERAGE	-	4.4
PART TIME	25	AVERAGE	-	5

(In the 5 Establishments)

9.15 AVERAGE OF BUSINESSES DERIVED FROM TOURISM (Estimate)

55%
*Figures from 4 establishments

9.16 AVERAGE SEASONAL VARIANCE IN TURNOVER (Estimate)

+140% During the Holiday Season.
*Figures from 4 establishments.

9.17 AVERAGE NUMBER OF NEW POSTS CREATED DURING THE HOLIDAY SEASON.

FULL TIME - 2.9 PART TIME - 2.0

9.18 GROWTH / DECLINE IN TRADE

GROWTH - 3 SAME - 2 DECLINE - 0

9.19 HAS THE TOURIST INDUSTRY FULLY DEVELOPED IN LLANBERIS?

NO 5/5 (100%) YES 0

9.20 TO WHAT EXTEND DO YOU COOPERATE WITH OTHER COMPANIES?

NONE - 1 (20%) A LITTLE - 0 A GREAT DEAL - 4 (80%)

9.21 WHAT ORGANISATIONS EXIST TO ENABLE COOPERATION BETWEEN COMPANIES?

LLANBERIS BUSINESSES CONSORTIUM

LLANBERIS PROJECT

SNOWDONIA ACTIVE

www.llanberis.org

9.22 NUMBERS QUESTIONED WHO WERE MEMBERS OF CONSORTIUM LLANBERIS

4/5 (80%)

9.23 WOULD MORE COOPERATION BE BENEFICIAL?

CERTAINLY - 5 UNSURE - 0 NO - 0

9.24 PRESENT MARKETING METHODS

Website	-	(3)
Pamphlets	-	(1)
Advertising as a national company	-	(2)

9.25 CONSIDERED HINDRANCES TO THE TOURIST TRADE

Local People's attitude	-	(2)
Lack of development on the lake	-	(1)
Lack of attractions	-	(1)
Youths roaming streets at night	-	(1)
Marketing	-	(1)
Local Government	-	(1)
None	-	(1)

9.26 BUSINESS OUTLOOKS

GOOD - 3 UNSURE - 2 POOR - 0

9.27 GENERAL REACTION TO THE TOURIST INDUSTRY IN LLANBERIS

Very good	-	(4)
Many people coming into the area	-	(2)
Tourists coming consistently all year	-	(1)
Could do better	-	(1)
Tourists not spending very much	-	(1)
Problems gaining access to sites for Outdoor activities (such as paragliding etc)	-	(1)

BEDDGELERT

9.28 NUMBER EMPLOYED

FULL TIME	-	27	AVERAGE	-	5.4
PART TIME	-	6	AVERAGE	-	1.2

(In the 5 Establishments)

9.29 AVERAGE NUMBER OF BUSINESSES DERIVED FROM TOURISM (Estimate)

82.5% *Figures from only 4 establishments

9.30 AVERAGE SEASONAL VARIANCE IN TURNOVER (Estimate)

No definite figure from any of the 4 establishments (+100% was the only other figure)

9.31 AVERAGE NUMBER OF NEW POSTS CREATED DURING HOLIDAY SEASON

FULL TIME - 3.5 PART TIME - 2

9.32 GROWTH / DECLINE IN TRADE

GROWTH - 4 THE SAME - 1 DECLINE - 0

9.33 HAS THE TOURIST INDUSTRY FULLY DEVELOPED IN BEDDGELERT?

NO - 0 YES - 5/5 (100%)

9.34 TO WHAT EXTENT DO YOU COOPERATE WITH OTHER COMPANIES?

NONE - 0 A LITTLE - 1 (20%) A GREAT DEAL - 4 (80%)

9.35 WHAT ORGANISATIONS ARE AVAILABLE TO ENABLE COOPERATION BETWEEN COMPANIES?

BEDDGELERT TOURISM ASSOCIATION
www.beddgelerttourism.com

9.36 NUMBERS QUESTIONED WHO WERE MEMBERS OF THE TOURISM GROUP

5/5 (100%)

9.37 WOULD MORE COOPERATION BE BENEFICIAL?

CERTAIN - 1 NOT SURE - 2 NO - 2

9.38 PRESENT MARKETING METHODS

Website	-	(2)
Direct Marketing	-	(1)
None	-	(3)

9.39 CONSIDERED HINDRANCES TO THE TOURIST TRADE

Traffic Problems	-	(1)
Parking Problems	-	(2)
The Weather	-	(1)

9.40 BUSINESS OUTLOOKS

GOOD - 2 UNSURE - 3 POOR - 0

9.41 GENERAL REACTION TO THE TOURISM BUSINESS IN BEDDGELERT

Very Good	-	(4)
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PORTHMADOG

9.42 NUMBER EMPLOYED

FULL TIME	10	AVERAGE	-	2.0
PART TIME	23	AVERAGE	-	4.6

(In the 5 establishments)

9.43 AVERAGE NUMBER OF BUSINESSES DERIVED FROM TOURISM (Estimate)

43%

9.44 AVERAGE SEASONAL VARIANCE IN TURNOVER (Estimate)

+89% during the holiday season.

*Figures from 4 establishments

Again, not much information was received on variety of staff as the number of staff remained the same but working hours increased.

9.45 GROWTH / DECLINE IN THE TRADE

GROWTH – 0 THE SAME – 1 DECLINE - 4

9.46 IS THE TOURISM MARKET FULLY DEVELOPED IN PORTHMADOG?

NO - 4/5 (80%) YES - 1/5 (20%)

9.47 TO WHAT EXTENT DO YOU COOPERATE WITH OTHER COMPANIES?

NONE - 2 (40%) A LITTLE - 2 (40%) A GREAT DEAL - 1 (20%)

9.48 WHAT ORGANISATIONS EXIST TO ENABLE COOPERATION BETWEEN COMPANIES?

PORTHMADOG CHAMBER OF TRADE
www.porthmadog.com

9.49 NUMBERS QUESTIONED WHO WERE MEMBERS OF THE CHAMBER OF TRADE

0/5 (0%)

9.50 WOULD MORE COOPERATION BE BENEFICIAL?

CERTAINLY - 3 UNSURE - 0 NO - 2

9.51 PRESENT MARKETING METHODS

Website	-	(2)
Advertising in magazines	-	(1)
Advertising as a national company	-	(1)
None	-	(2)

9.52 CONSIDERED HINDRANCES TO THE TOURIST TRADE

Customers taking foreign holidays	-	(1)
Planning regulations	-	(1)
Disorderly youths roaming streets at night	-	(1)
Tourism Agencies taking too much commission	-	(1)
Shortage of trained staff	-	(1)
The weather	-	(1)

9.53 BUSINESS OUTLOOKS

GOOD - 2 UNSURE - 3 POOR - 0

9.54 GENERAL REACTION TO THE TOURISM SITUATION IN PORTHMADOG

Very good	-	(4)
Enough people in the area	-	(1)
Needs Tidying	-	(1)
Needs Marketing	-	(1)

PWLLHELI

9.55 NUMBER EMPLOYED

FULL TIME	36	AVERAGE	-	7.2
PART TIME	56	AVERAGE	-	11.2
(In the 5 Establishments)				

9.56 AVERAGE NUMBERS OF BUSINESSES DERIVED FROM TOURISM (Estimate)

53.06%

9.57 AVERAGE SEASONAL VARIANCE IN TURNOVER (Estimate)

+66% During the Holiday Season

Again, not much information was received on variety of staff, as the number of staff remained the same but working hours increased.

9.58 GROWTH / DECLINE IN THE TOURIST TRADE

GROWTH – 1 THE SAME– 0 DECLINE - 4

9.59 IS THE TOURISM INDUSTRY FULLY DEVELOPED IN PWLLHELI?

NO - 5/5 (100%) YES - 0

9.60 TO WHAT EXTENT DO YOU COOPERATE WITH OTHER COMPANIES?

NONE - 4 (80%) A LITTLE - 0 A GREAT DEAL - 1 (20%)

9.61 WHAT ORGANISATIONS EXIST TO ENABLE COOPERATION BETWEEN COMPANIES?

PWLLHELI CHAMBER OF TRADE

9.62 NUMBERS QUESTIONED WHO WERE MEMBERS OF THE CHAMBER OF TRADE

1/5 (20%)

9.63 WOULD MORE COOPERATION BE BENEFICIAL?

CERTAINLY - 4 UNSURE - 1 NO - 0

9.64 PRESENT MARKETING METHODS

Website	-	(1)
Advertising in magazines	-	(1)
Advertising as a national company	-	(2)
No marketing	-	(1)

9.65 CONSIDERED HINDRANCES TO THE TOURISM MARKET

Local Government	-	(3)
Lack of attractions	-	(1)
Lack of developing the marina	-	(3)
Lack of maintenance	-	(1)
Shopping hours	-	(1)

9.66 BUSINESS OUTLOOKS

GOOD - 2 UNSURE - 1 SAME - 1 POOR - 0

9.67 GENERAL REACTION TO THE TOURIST TRADE IN PWLLHELI

Very Good	-	(1)
Not enough to do / Lack of attractions	-	(1)
Loss after Butlins	-	(1)
Good Beach	-	(1)
Lack of Marketing	-	(1)

SUMMARY OF ALL THE AREAS

9.68 NUMBER EMPLOYED

FULL TIME – Average	-	4.96
PART TIME –Average	-	5.65

9.69 AVERAGE NUMBERS OF BUSINESS DERIVED FROM TOURISM (Estimate)

43%

9.70 AVERAGE SEASONAL VARIANCE IN TURNOVER (Estimate)

+92.25% During the Holiday season.

9.71 GROWTH / DECLINE IN TRADE

GROWTH – 40% SAME – 24% DECLINE - 36%

9.72 TO WHAT EXTENT DO YOU COOPERATE WITH OTHER COMPANIES?

NONE - 36% A LITTLE - 24% A GREAT DEAL - 40%

9.73 NUMBERS QUESTIONED WHO WERE MEMBERS OF COOPERATIVE MOVEMENTS

44%

9.74 BUSINESS OUTLOOKS

GOOD - 52% UNSURE - 40% SAME - 4% POOR - 4%

9.75 PRESENT MARKETING METHODS

Website	-	48%
Advertising as a national company	-	24%
Advertising in magazines	-	12%
Advertising in ‘brochures’	-	4%
Corporate Advertising	-	4%
Yellow Pages	-	4%
Direct Marketing	-	4%
Pamphlets	-	4%
No advertising	-	24%

9.76

	HOTELS	PUBLIC HOUSES -	SHOPS	POST OFFICES	CAFÉ
Average Staff Full Time	5.8	5.4	4.7	2.4	7
Average Staff Part time	8.6	2.0	11	2.2	4
% Business from Tourism	62%	63%	52%	20%	58%
Seasonal Variance		140%	81.7%	30%	152%
Extra Staff			+4.25		
Growth in Businesses	40%	40%	20%	20%	60%
Decline in Business	20%	40%	60%	40%	20%
Established Business	40%	20%	20%	40%	20%
<u>Cooperation?</u>					
Good	40%	60%	20%	0%	40%
A little	40%	40%	0%	40%	40%
None	20%	0%	80%	60%	20%
<u>More Cooperation?</u>					
Yes	60%	80%	100%		60%
No	40%	20%	0%		40%
% With Website (independent)	80%	80%	0%	20%	40%
OUTLOOKS Good	100%	40%	40%	0%	60%
OUTLOOKS Unsure	0%	40%	60%	100%	20%
OUTLOOKS Same	0%	20%	0%	0%	20%
OUTLOOKS Poor	0%	0%	0%	0%	0%

SUMMARY AND ANALYSIS OF THE QUESTIONNAIRES TO INDIGENOUS BUSINESS PROVIDERS IN THE VALLEY

10.1 NUMBER EMPLOYED IN EACH BUSINESS (Average)

Full Time	-	2.4
Part Time	-	2.85

10.2 ESTIMATE OF PERCENTAGE OF BUSINESS FROM TOURISM

5.3%

10.3 SEASONAL VARIANCE IN BUSINESS

+8% During the Holiday Season

10.4 AVERAGE NUMBER OF EXTRA JOBS CREATED IN THE HOLIDAY SEASON

+0.25 During the Holiday Season

10.5 GROWTH / DECLINE IN THE TOURISM SECTOR

Growth	-	10%
Stable	-	20%
Decline	-	50%
No change	-	20%

10.6 REASONS GIVEN FOR THE DECLINE

Cheap foreign holidays	-	(2)
The by-pass	-	(2)

10.7 REASONS GIVEN FOR THE INCREASE

More people coming to the area	-	(2)
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10.8 DEGREE OF LOCAL COOPERATION BETWEEN COMPANIES

Good	-	40%
A little	-	40%
None	-	20%

10.9 WOULD MORE COOPERATION BE BENEFICIAL?

Yes	-	70%
Maybe	-	10%
No	-	20%

10.10 WOULD YOU WELCOME A MARKETING STRATEGY FOR THE VALLEY?

Yes	-	90%
Not sure	-	10%
No	-	0%

10.11 HINDRANCES CONSIDERED TO BE PREVENTING THE DEVELOPMENT OF TOURISM IN THE VALLEY

Lack of attractions	-	(5)
Failure to develop Dorothea Quarry	-	(2)
Lack of local interest	-	(2)
Lack of investment	-	(2)
Lack of marketing	-	(2)
Lack of information about current attractions-	-	(1)
The by-pass	-	(1)
Untidiness / lack of maintenance	-	(1)
Youths roaming streets at night	-	(1)
Lack of Public Services	-	(1)
No activities for children	-	(1)

10.12 BUSINESS OUTLOOKS FOR THE FUTURE

Good	-	40%
Stable	-	20%
Unsure	-	30%
Decline	-	20%

10.13 WOULD YOU WELCOME SUBSTANTIAL DEVELOPMENT IN TOURISM FOR THE VALLEY?

Yes	-	100%
No	-	0%

10.14 OPINIONS ON THE PRESENT STATE OF TOURISM IN THE VALLEY

Very poor	-	(4)
No opinion	-	(4)
Lack of attractions	-	(2)
Much more could be done	-	(2)
Barely exists	-	(1)