From:	PMO
To:	Wylfa Newydd
Subject:	RE: IACC Deadline 2 Submission : Local Impact Report - Housing (email 13)
Date:	04 December 2018 20:01:44
Attachments:	image001.png image002.png image003.png Annex 8P - 8V (Batch 3 of 3).zip

Please note, a number of emails will follow in relation to the LIR – we will confirm the final e-mail.

Pnawn Da/ *Good afternoon*,

Gweler ynghlwm cynrychiolaeth CSYM mewn perthynas â'r uchod / *Please see IACC's representation in respect of the above.*

Bydd fersiwn Gymraeg yn cael ei ddarparu cyn gynted a phosib / *A Welsh version of the submission will be provided in due course.*

Cofion/ *Regards*,
Manon

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CYNGOR SIR YNYS MÔN
ISLE OF ANGLESEY COUNTY COUNCIL

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REPORT

Isle of Anglesey County Council

Accommodation Bedstock Survey
June 2018

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1. Executive Summary

Part A: Accommodation Profile of Survey Respondents

Occupancy as high as 85% in the summer, but as low as 40% in the winter	Occupancy in the 'high-season' season ranges from 70% in May and increases to 85% in August. Occupancy in the 'off-season' is as low as 40% – 42% between November and February. The average all year occupancy (across all sectors) is 60%. During the quietest months of the year (Nov-Feb), between 27% and 34% of providers are closed.
Self catering occupancy is consistently higher throughout the year	Booking bed spaces for construction workers may be more difficult in the self catering sector. Particularly in the high-season where occupancy ranges from 76% in May, rising to 88% in August and is busy right through until October.
Survey respondents employ 1554 FTE staff	262 providers gave information on the number of employees – permanent and seasonal – involved in running their business. In total, 1,554 full time equivalent staff are employed by these accommodation providers. This amounts to 1,109 employed permanently and 445 on a seasonal basis.
Average minimum and maximum price per night	Understandably, caravans and campsites have the lowest average minimum and average maximum price per night (£23.48 and £39.28 respectively). This is followed by serviced accommodation (£60.80 and £102.40) and then self catering (£76.07 and £145.91).
Bed spaces	Based on survey findings and supplementary desk research, there are an estimated 35,800 bed spaces on Anglesey. 5% are in serviced accommodation, 73% in camping and caravanning and 22% in self catering. This excludes tent pitches for which estimates would be unreliable.

Part B: Perceptions of Proposed Major Developments

Serviced accommodation providers are most interested in housing workers	Overall, only 56% of accommodation providers are interested in accommodating construction workers. Differences by accommodation *type* show that serviced accommodation providers are most interested in accommodating workers (82%). 55% of self catering providers are interested and only 35% of caravans/campsites are interested.
Higher occupancy is seen as the main benefit of housing workers	A perceived increase in business is seen as the main benefit of housing workers. 55% say increased occupancy is the main benefit of housing workers and 21% say regular or assured income is the main benefit – especially over the winter months.

Most-interest in accommodating workers in the 'off-season'	The overwhelming majority of those willing to accommodate workers are interested in accommodating them in the off season (88%-95% are interested in the months from October to April). Interest is lowest in July and August at 78%. However, this is still a high figure and shows there is interest all year round.
Some don't need the extra custom or feel their accommodation is unsuitable	The most common reason for not being interested in accommodating workers is because the provider feels their business is doing well as is (19%). Other reasons cited include providers saying their accommodation is unsuitable, their accommodation is too high quality or expensive, or they don't want to disappoint their loyal customers who return every year, by being full.
A third are interested in a Central Accommodation Management Service	Although a further 23% are 'maybe' interested and could potentially be convinced to sign up to this service. Interest in this service generally aligns with accommodating workers in general. Serviced accommodation providers are most interested in accommodating workers, and are also most interested in this service (42% are interested and 32% are maybe interested).
Some prefer direct contact over this service	The most common reasons for not being interested in a central service is that some providers prefer to deal directly with their customers (35%). Other reasons include that the business is doing fine without one (15%) and that bookings are dealt with by a third party (13%).
Disruption and damage to the environment is a concern	34% of providers say this is a significant challenge and 24% say it's a slight challenge (58% combined). Of the five potential challenges that providers were asked to rate, services and businesses not coping with the influx of workers was seen as the least challenging. Only 14% see it as a significant challenge, but 30% say it will be a slight challenge. 56% say it won't be a challenge.
Opportunities and challenges in promoting Anglesey	Providers say that Anglesey has outstanding scenery and that this in itself is the biggest opportunity to businesses. Also, that Anglesey is better known than ever thanks to TV coverage and recognition from the Duke and Duchess of Cambridge living there. Although some feel Anglesey is better known than ever, the most commonly mentioned challenge, or request, is for Anglesey to be promoted even more. Perhaps even that Anglesey could achieve similar stature to destinations like Cornwall.

2. How and Why has this Research been Conducted?

Proposed new nuclear power plant	A new nuclear power plant – Wylfa Newydd - is being proposed on the Isle of Anglesey. It will be built close to the existing Magnox nuclear power plant at Wylfa, which is being decommissioned. The construction programme is approximately 10 years.
National Grid	National Grid are proposing to construct a power line from the proposed new nuclear power plant to an existing substation at Pentir on the mainland. The new power line will be close to existing pylons and will comprise mainly overground power lines, apart from underground sections where it crosses the Menai Strait.
Impact on traffic	The above two projects will impact on traffic on and around Anglesey. Vehicular and maritime traffic will increase in volume.
Objective was to understand the capacity of sector and perceptions of developments	Isle of Anglesey County Council commissioned this independent research in autumn 2017 to: ▪ Understand the capacity of the accommodation sector on Anglesey in terms of units and bed spaces ▪ Explore what tourism providers think about the proposed developments, including their willingness to host construction workers
Development of the survey	The survey was developed by SRI and IACC in close consultation with sector representatives. Other stakeholders including Visit Wale and Horizon also fed into the development of the questionnaire and methodology.
Telephone and online survey	A comprehensive database of accommodation providers was compiled based on a range of data sources including: ▪ IACC Tourism data ▪ IACC Caravan and Camping lists ▪ Visit Wales ▪ Anglesey Tourism Association ▪ Go North Wales ▪ A wide range of self catering sites including AirBnB, Menai Holiday Cottages, Sykes, Coastal Cottages, Hoseasons, Quality Cottages, Booking.com and various other sites. Once the database was compiled, a survey of accommodation providers was conducted primarily by telephone. An online survey was available and publicised by project stakeholders but had a relatively low response. In total, 268 accommodation providers took part in the survey.
Desk research	As it was not possible to identify contact details for all providers, a separate desk research exercise was conducted to compile

	capacity data, from various sites particularly for the self catering sector. This involved identifying, where possible, location information and data on units, bedrooms and bed spaces. It was also agreed that AirBnb properties to be covered were Entire properties which are included in the calculations under self catering provision, rather than 'rooms to let'. This means that further accommodation is available as individual rooms to let and are outside the scope of this exercise. At the end of the fieldwork period, any providers which it was not possible to contact but which we believe to be still active in the sector were also included in capacity desk research activities. Data from over 800 properties has been included in the supplementary desk research analysis.
Analysis assumptions	For the purposes of this survey, a number of assumptions have been made, primarily relating to calculations on bed stock figures. For caravan bed spaces, we have assumed that each has an average of 4 bed spaces where information was not available from the provider. This has been applied where the number of pitches is known but not an estimate of bed spaces. Tent pitches have not been included in the bed space analysis. Cots and extra beds have been excluded from any analysis.
Report outline	The findings of the survey responses are provided in Sections 3 and 4 of the report. Estimates of capacity based on desk research, including those surveyed is provided in Section 5.

3. Part A: Accommodation Profile of Survey Respondents

3.1 This section outlines feedback from the 267 survey participants who provided accommodation profile information.

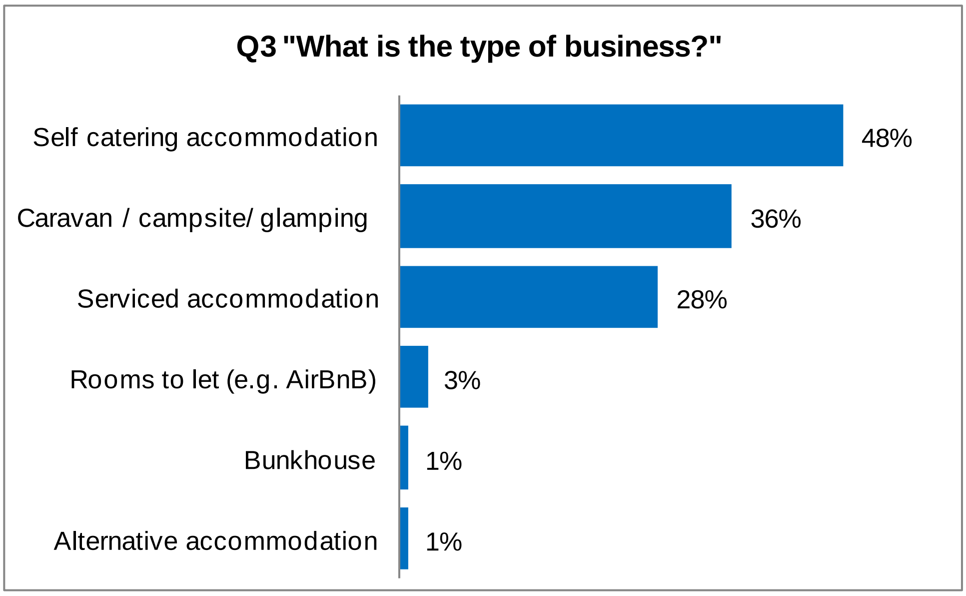
3.2 In this section we provide the information asked of all survey respondents:

- Type of business
- Employees
- Grading
- Pricing

3.3 After this follows a section grouped by type of operator – serviced, camping and caravanning, self catering – where the core bedstock information is provided. Further details on estimated bedstock capacity overall, including those not taking part in the survey, is provided later in the report in Section 5:

- Number of bedrooms, units or pitches
- Estimated number of bed spaces

Type of business



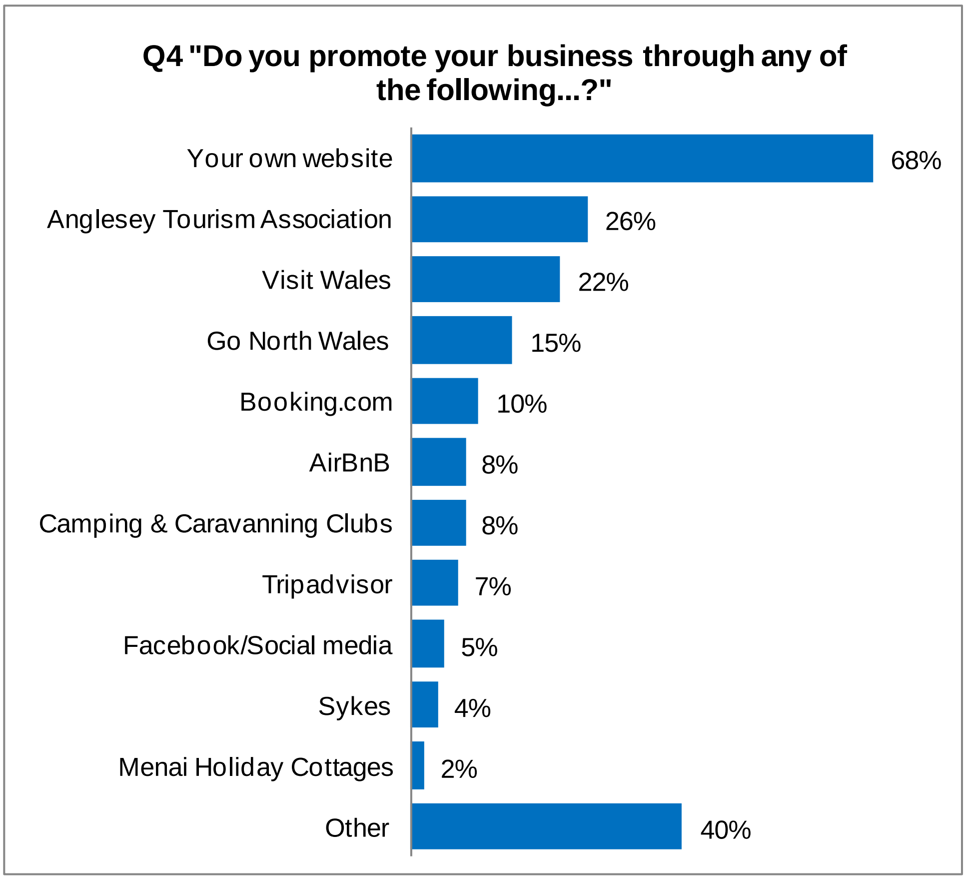
Base: 267 respondents

Around half are self catering accommodation providers

3.4 Almost half of those taking part in the survey provide self-catering accommodation.

3.5 There is some overlap between these business categories where some providers offer more than one type of accommodation such as a serviced and self catering, or serviced and caravan or camping accommodation.

Business promotion



Base: 265 respondents

Own websites, destination website and VW are most used for promotions

3.6 Websites owned by the accommodation providers are the most popular means by which businesses in this sector are promoted (68%).

3.7 The destination website provided by Anglesey Tourism Association is used by a quarter and Visit Wales by a fifth.

3.8 Relatively few of those responding to the survey promote their business through third party routes such as AirBnB, Booking.com, Sykes and Menai Holiday Cottages.

3.9 We know, however, that a significant part of the self catering sector on Anglesey use these types of third parties to attract visitors and that relatively few of these types of providers are represented in the survey.

3.10 Supplementary desk research was conducted to identify key details about these operators. Had they participated in the survey, the proportions above would have been significantly higher for third party services.

Occupancy in 2017

3.11 Providers were asked for information about occupancy during 2017. A few were not trading throughout the whole of 2017, or were closed for certain parts of the year, particularly off-season.

Accommodation Closures

Seasonal closures based on 2017 data	Providers Closed (%)
January	34%
February	33%
March	14%
April	6%
May	4%
June	4%
July	2%
August	2%
September	3%
October	18%
November	27%
December	30%

Base: 252 respondents

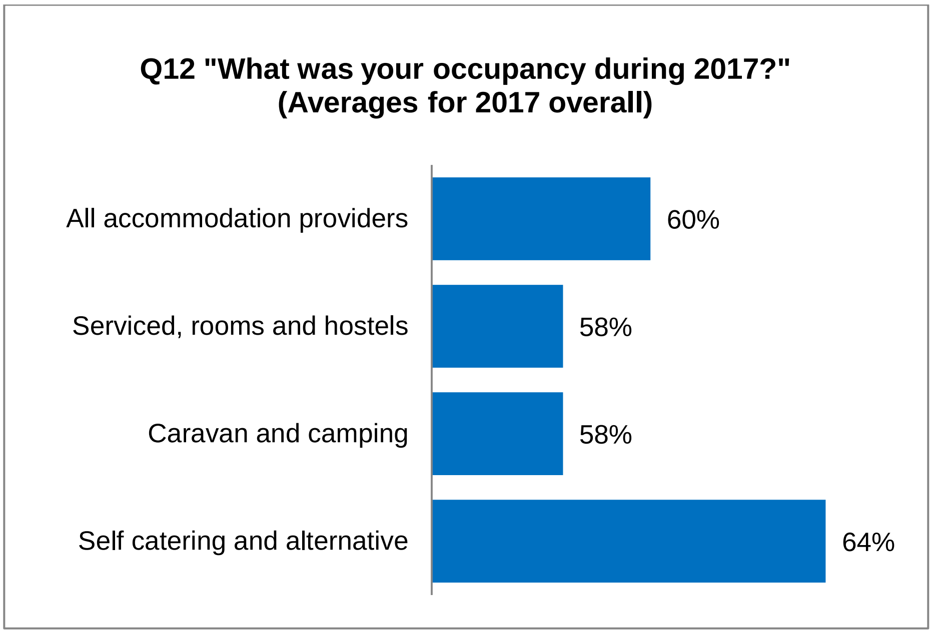
Around three in ten operators are closed during winter months

3.12 The table above shows the percentage of providers closed during 2017.

3.13 Around three in ten operators were closed during the months of November and December 2017. A third were closed during January and February 2017 and some remained closed during March (14%) and October (18%).

3.14 Few were closed during peak season. Where this is the case, some mention ill-health as the reason for closure while others only offered accommodation for parts of the year.

Average occupancy during 2017



Base: 242 respondents; those providing occupancy data

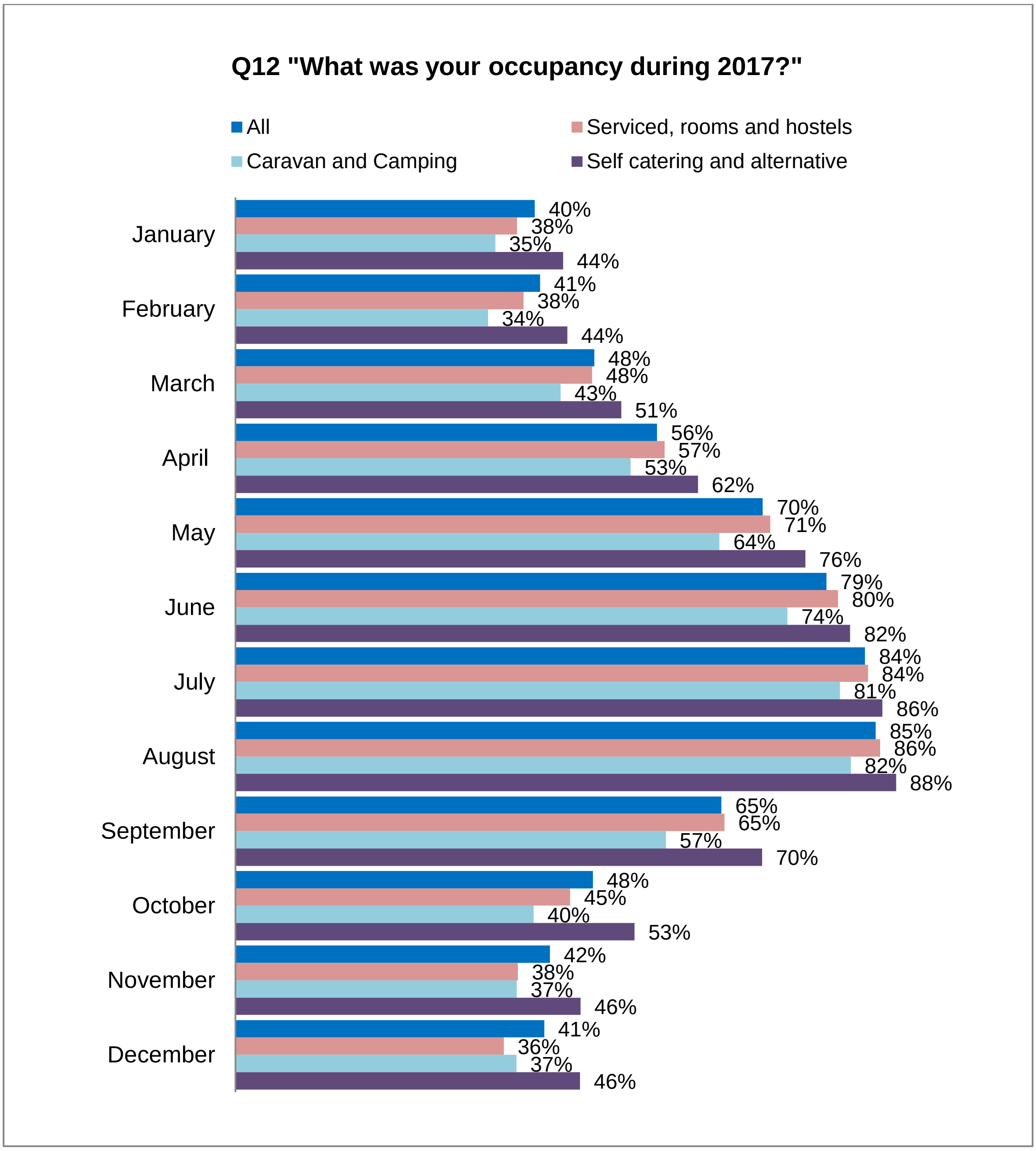
Highest occupancy for self catering sector

3.15 The chart above shows average occupancy figures for the year overall by type of provider. The figures below exclude cases where data was either not known or where providers were closed during certain times of the year.

3.16 Overall occupancy averaged 60% for all types of accommodation.

3.17 Self catering and alternative accommodation have the highest levels of occupancy, with an average of 64% across the year and other types of accommodation slightly lower.

Average occupancy by month



Base: 242 respondents; those providing occupancy data

Self catering occupancy consistently higher throughout the year

3.18 The chart above shows occupancy by month by type of accommodation. The figures exclude cases where data was either not known or where providers were closed during certain times of the year.

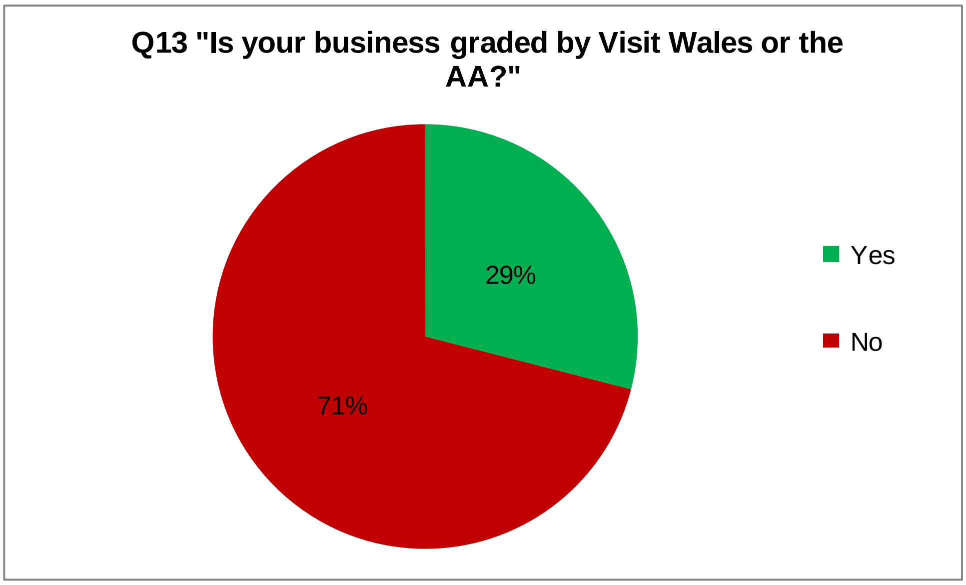
3.19 Overall, variations follow expected trends in peak and off peak months throughout the year. Occupancy peaks during August for all types of accommodation.

3.20 Self catering and alternative providers consistently have the highest levels of occupancy throughout the year and have good rates of occupancy through to

October. This suggests that there is limited capacity available for other uses during peak season.

3.21 Camping and caravanning operators have the lowest levels of occupancy, particularly during off-season.

Grading



Base: 266 respondents

Three in ten operators are graded

3.22 Overall, just under a third of operators are graded by Visit Wales or the AA (29%). Just over a third of self catering outlets are graded (36%), 30% of serviced accommodation are graded and 15% of caravan or camping operators are graded.

Employment

3.23 Accommodation providers were asked about the number of employees – permanent and seasonal – involved in running the business. The table below shows total employment overall for the 262 participants who provided information for this question.

3.24 Analysis is also given by type of operators. However, please note that in some cases, employment relates to more than one type of business where providers offer two or more types of accommodation e.g. serviced and self catering. As a result, the percentages below do not total to 100%.

3.25 To keep the questionnaire as simple as possible, employment data was not collected separately where more than one type of accommodation is offered.

	Serviced, rooms and hostels	Caravan and camping	Self catering and alternative	All providers
Total permanent staff (Full time equivalents)	610.5	307	320	1109.5
% Permanent staff	55%	28%	29%	
Average number of permanent staff	7.7	3.2	2.6	4.2
Total seasonal staff (Full time equivalents)	297.5	102	111	444.5
% Seasonal staff	67%	23%	25%	
Average number of seasonal staff	3.7	1.1	0.9	1.7
Base	81	96	128	262

3.26 Over 1,100 people are employed permanently by the accommodation providers who gave information about employment, over half of which are employed in the serviced, rooms and hostels sector.

3.27 On average, there are 4.2 members of staff per provider rising to 7.6 in serviced categories and lowest in self catering where it is 2.6 employees.

3.28 Almost 445 additional staff are employed on a seasonal basis, two thirds of which are in the serviced, rooms and hostels sector. Seasonal employment is lowest in caravan and camping and self catering sectors.

3.29 Combined permanent and seasonal employment amounts to 1,554 full time equivalent staff giving an average of 5.9 staff per provider.

Pricing

3.30 Accommodation providers who took part in the survey were asked about the minimum and maximum prices they charge for a room or unit per night.

3.31 Where operators provide more than one type of accommodation e.g. serviced and self catering, they were asked to provide figures for each and these have been analysed separately as far as possible.

3.32 Some providers were unwilling or unable to answer this question and did not provide information. Where possible, we have supplemented information using the provider's website, and were often directed there.

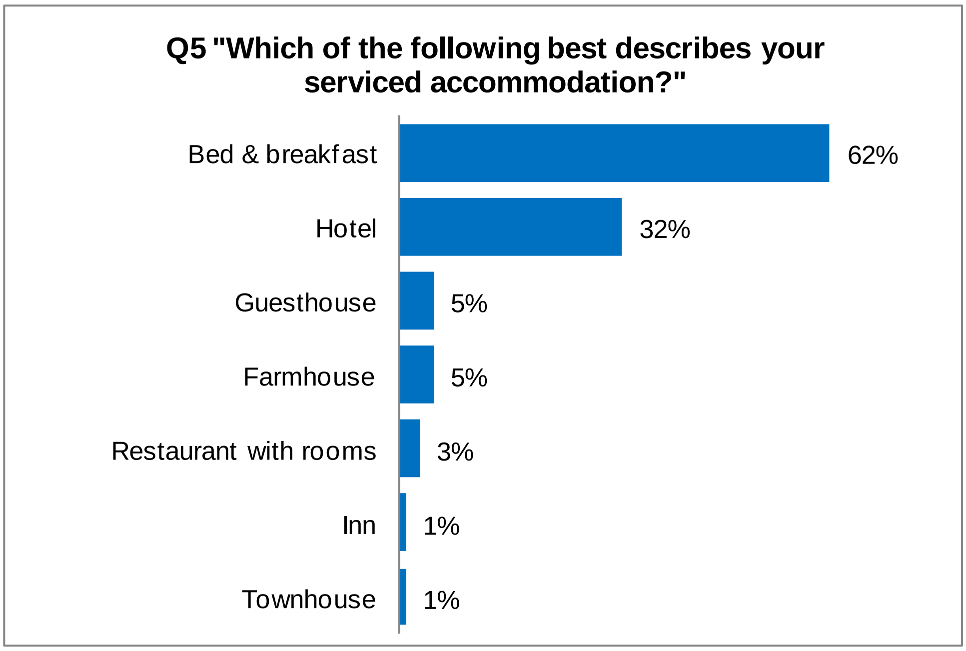
3.33 In some cases such as self catering, accommodation is charged on a weekly rather than nightly basis. Figures have been divided by seven in order to reach a per night figure even though many comment that there is a 3 night minimum stay requirement.

	Serviced, rooms and hostels	Caravan and camping	Self catering and alternative
Average minimum price per night	£60.80	£23.48	£76.07
Average maximum price per night	£102.40	£39.28	£145.91
Range for minimum price per night	£12 - £110	£8 - £80	£7 - £948
Range for maximum price per night	£20 - £350	£10 - £172	£10.50 - £993
Base	80	73	113

Serviced accommodation, rooms to let and hostels

3.34 This section outlines feedback from the survey participants who offer serviced accommodation, rooms to let or hostels.

Type of Accommodation



Base: 74 respondents; serviced accommodation providers

B&B and hotels are most common type of serviced accommodation

3.35 Of those providing serviced accommodation, over six in ten (62%) are B&Bs and around a third are hotels. Few describe themselves in the other categories.

Bedrooms and bed spaces

3.36 Based on data provided by 80 survey participants who offer serviced accommodation, rooms to let or hostels, there are over 740 rooms and 1,600 bed spaces for these providers alone:

Serviced sector capacity	Total	Average per operator
Bedrooms	741	9.3
Bed spaces	1601	20

Caravan & Camping

Pitches

3.37 Based on data provided by the 97 caravan and camping operators who took part in the survey, there are over 6,200 pitches for these providers alone:

Type of caravan and camping pitches	Total pitches	Average pitches per operator*	% Operators with pitches
Static caravans (to let)	164	6	29%
Static caravans (privately owned)	2,833	69	42%
Touring caravan pitches (to let)	893	19	47%
Touring caravan pitches (privately owned)	712	34	22%
Seasonal caravan /tent pitches (less than one month)	740	44	18%
Glamping tents / pods	34	6	6%
Tent pitches	890	25	37%
Total pitches	**6,266**	**65**	

* Based on operators who have these types of pitches

3.38 Two in five operators (42%) provide pitches for privately owned static caravans which account for 45% of all of the pitches available.

3.39 Touring caravan pitches to let are offered by almost half (47%) of the caravan and camping providers and these make up 14% of all pitches.

3.40 Static caravans to let make up just under 3% of all pitches.

Bed spaces

3.41 Survey participants were asked to estimate the number of bed spaces available on site for static caravans and glamping. Where numbers were not provided we have applied a conservative estimate of 4 bed spaces per unit. Tent pitches have not been estimated as these could vary widely depending on the size of the party.

Type of caravan and camping accommodation	Total pitches	Estimated bed spaces
Static caravans (to let)	164	655
Static caravans (privately owned)	2,833	13,719
Touring caravan pitches (to let)*	893	3,572*
Touring caravan pitches (privately owned)*	712	2,848*
Seasonal caravan /tent pitches (less than one month)*	740	2,960*
Glamping tents / pods	27	108
Tent pitches	890	Not estimated
Total		**23,862**

* Estimates based on 4 berths per unit

3.42 Almost six in ten (57%) bed spaces on camping and caravan sites are for privately owned accommodation. 3% are in static caravans to let and 12% on seasonal pitches.

3.43 27% of bed spaces are taken up by touring caravans.

Self catering and alternative accommodation

3.44 Based on data provided by the 126 self catering providers who took part in the survey, there are almost 650 units providing almost 3,200 bed spaces among survey participants alone.

3.45 We know that the survey response underestimates this capacity by a large margin. Further estimates for the entire sector are included in Section 5 based on desk research. The results for survey participants show:

Self catering units	Total	Average per operator
Units	647	5.1
Bed spaces	3,195	25.5

3.46 On average each provider has around 5 units and 26 bed spaces, but around half of all operators (49%) only have one self catering unit.

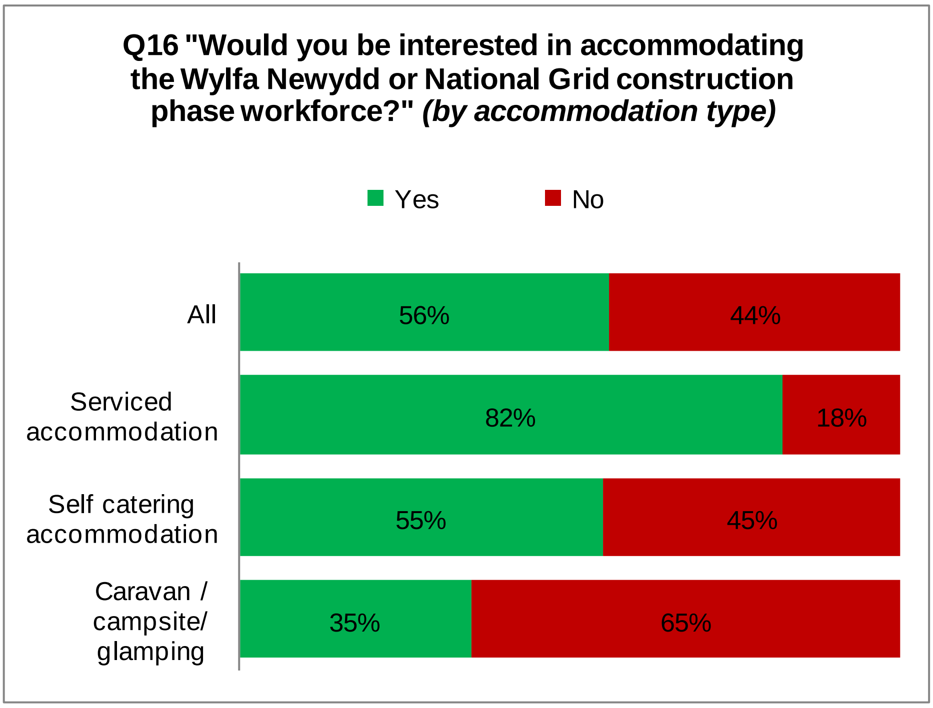
Number of self catering units held by provider	Number of respondents	% Operators
1	62	49%
2	19	15%
3	9	7%
4	13	10%
5	11	9%
6 or more	12	10%

4. Part B: Perceptions of Proposed Major Developments

4.1 Part B of the survey assessed what level of interest accommodation providers have in the various aspects of the major developments and how they might impact on the sector.

4.2 One key area explored was attitudes towards housing workers during construction of the major developments. We also sought their thoughts on the opportunities and challenges facing tourism in Anglesey, in general, but also in respect of these developments.

Interest in accommodating the workforce



Base: 267 respondents

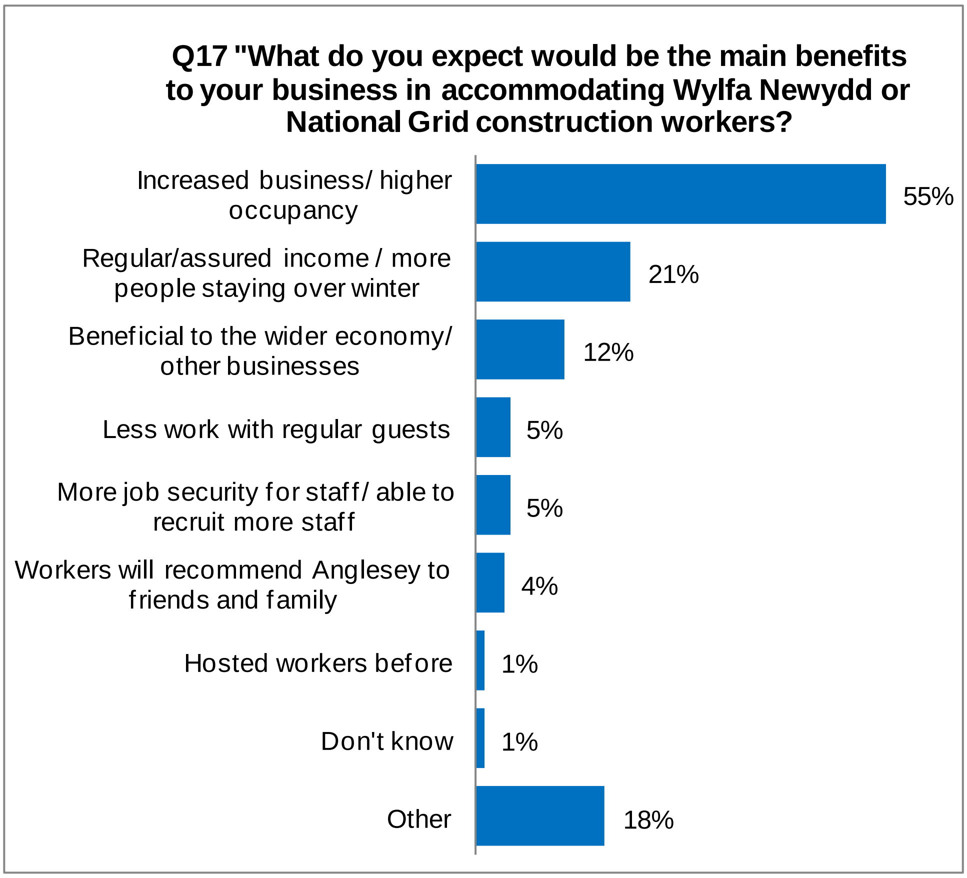
Serviced accommodation providers are most interested in housing workers

4.3 Over half (56%) of accommodation providers are interested in accommodating construction workers.

4.4 When looking at results by accommodation *type*, serviced accommodation providers are by far the most interested in accommodating construction workers (82%). Just over half of the self catering sector (55%), which would be potentially most suited to this, are interested.

4.5 Differences by *size* of accommodation show that 74% of providers with 10 or more employees are interested in accommodating construction workers, whereas only 55% with 0-2 employees are interested. This suggests that the larger operators are the most open to the idea.

Main benefits of housing workers



Base: 148 respondents; those willing to accommodate workers

Higher occupancy is seen as the main benefit of housing construction workers

4.6 This question was only asked of respondents who said that they were willing to provide workers with accommodation. It was an ‘open ended’ question, meaning that respondents were free to say or write what they want. Each response has been categorised into themes so that we can understand what providers feel are the main benefits resulting from the proposed major developments.

4.7 The most common perceived benefit is by far an increase in business or occupancy which was mentioned by over half (55%). The second most common benefit mentioned – regular or assured income as a result of people staying over winter (21%), again points to a perceived increase in business.

“Increased occupancy, especially in the self catering rooms.”
Serviced accommodation, 3-9 employees

“More occupancy, increase business in quiet 'off peak' times.”
Serviced accommodation, 3-9 employees

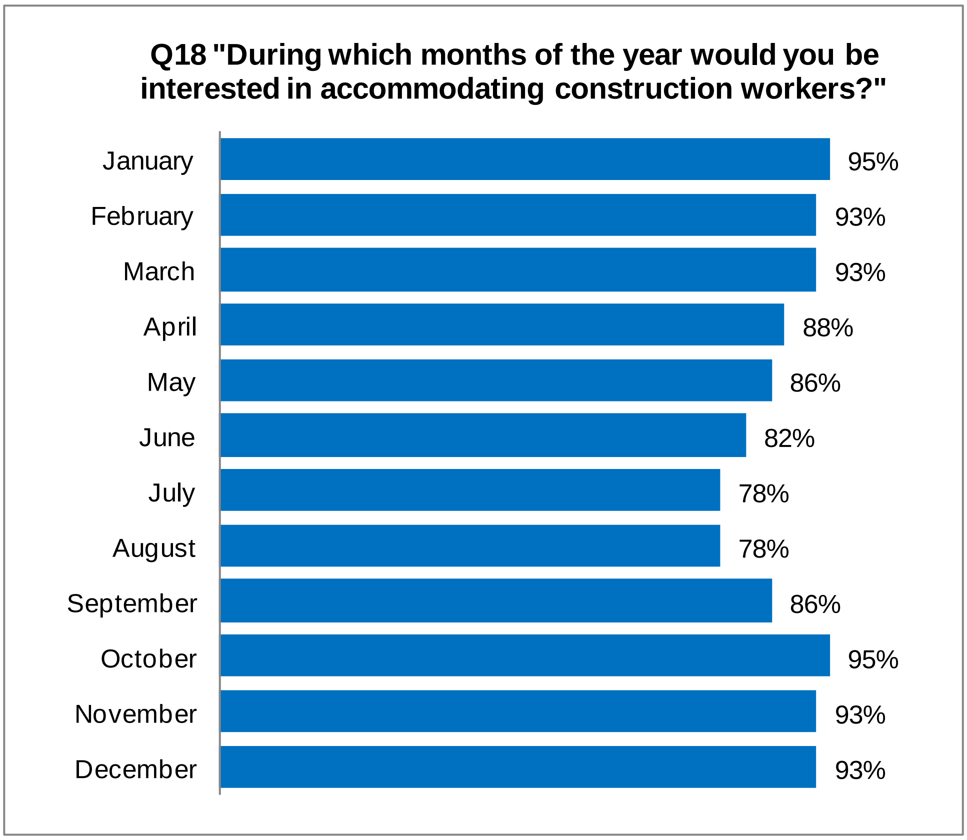
“It's a hugely valuable project for the island as it’s our main source of GDP. Anything that we can do to accommodate them we would be happy to do.”
Self catering accommodation, 3-9 employees

4.8 The other benefits are mentioned for the following reasons:

- Less work with regular guests: for example, not having to change the bed linen and towels every day and deal with check-ins/check-outs.

- More job security for staff/ able to recruit more staff: regular income will allow businesses to employ staff all year around (possibly even more staff) rather than just for the summer season.
- Workers will recommend Anglesey to family and friends: some feel that once workers see what Anglesey has to offer, they will recommend to others.
- Hosted workers before: a few providers have hosted trades people before and found that their stay benefitted their business.
- Other: given that this was an 'open-ended' question, there are always a wide variety of answers that don't fit into any of the main categories.

Interest in accommodating construction workers by month



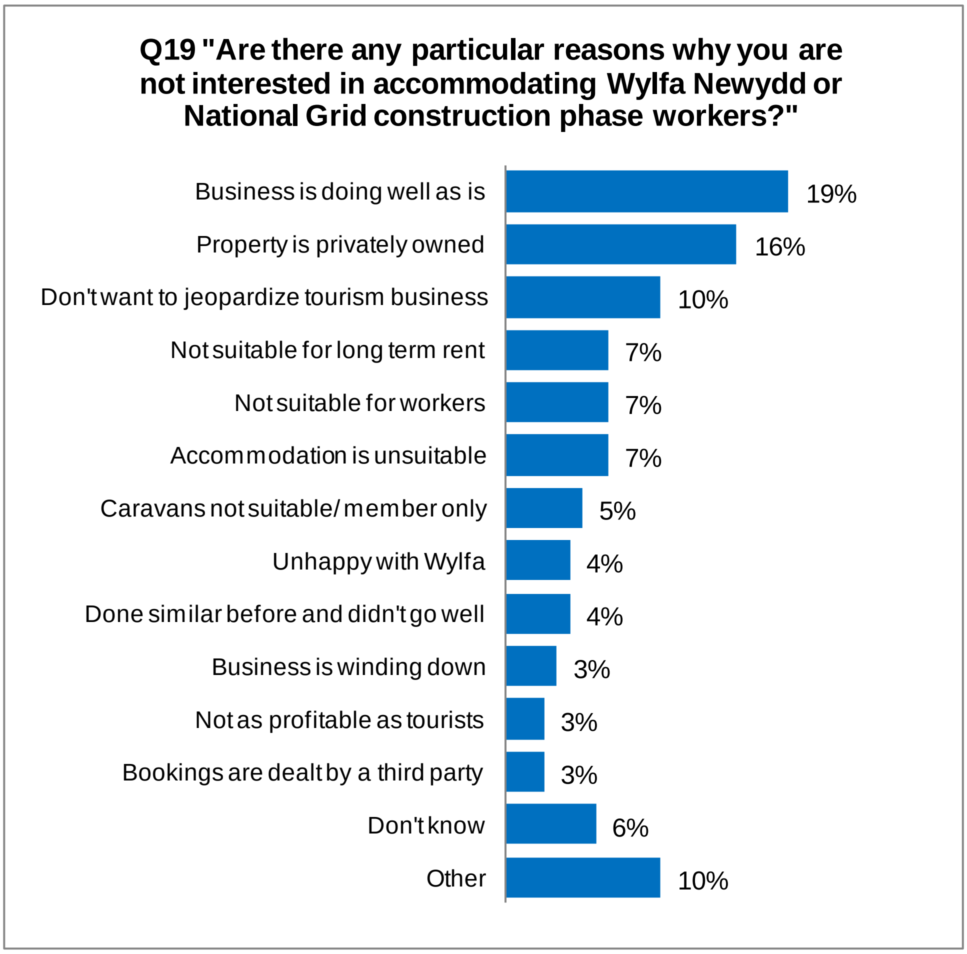
Base: 148 respondents; those willing to accommodate workers

Most interest in accommodating workers in the 'off-season'

4.9 Accommodation providers often rely on a good summer season with the rest of the year an 'added bonus'. More customers in the off-season could provide regular income and allow businesses to keep staff on for longer than only the summer season.

4.10 Despite interest being lower in the summer, there is actually interest all year round. Of the businesses that are interested in accommodating workers, over three quarters (78%) are interested in accommodating them during the busy months of July and August.

Reasons for not accommodating construction workers



Base: 115 respondents; those not willing to accommodate workers

Some businesses don't need the extra custom

4.11 The most common reason for not being interested in accommodating construction workers is because the business is doing well as it is (19%).

"Accommodation is always too full to consider bookings from the workforce."
Self catering accommodation, 3-9 employees

Many say their accommodation is unsuitable

4.12 The second most common reason – that the property is privately owned (16%) – comes from parks where caravans are privately owned. These park owners are unable to say whether or not the caravans would be available for rent as this would be decision made by the caravan owners.

4.13 Many of the reasons for showing no interest are because the property is unsuitable. These are:

- Not suitable for long term rent (7%), such as caravans.
- Not suitable for workers (7%); i.e. the provider feels the accommodation is too high quality or expensive.
- Caravans not suitable or member only (5%); caravans may be too cold in the winter months or can only take Caravan Club members.

- Accommodation is unsuitable (7%); where providers say their accommodation is unsuitable but give no reason why.

"Not appropriate for long term let, many caravans are privately owned."
Caravan / campsite/ glamping, 3-9 employees

"We're just not the target demographic. We provide luxury accommodation with saunas, not necessarily affordable for the workers."
Self catering accommodation, 0-2 employees

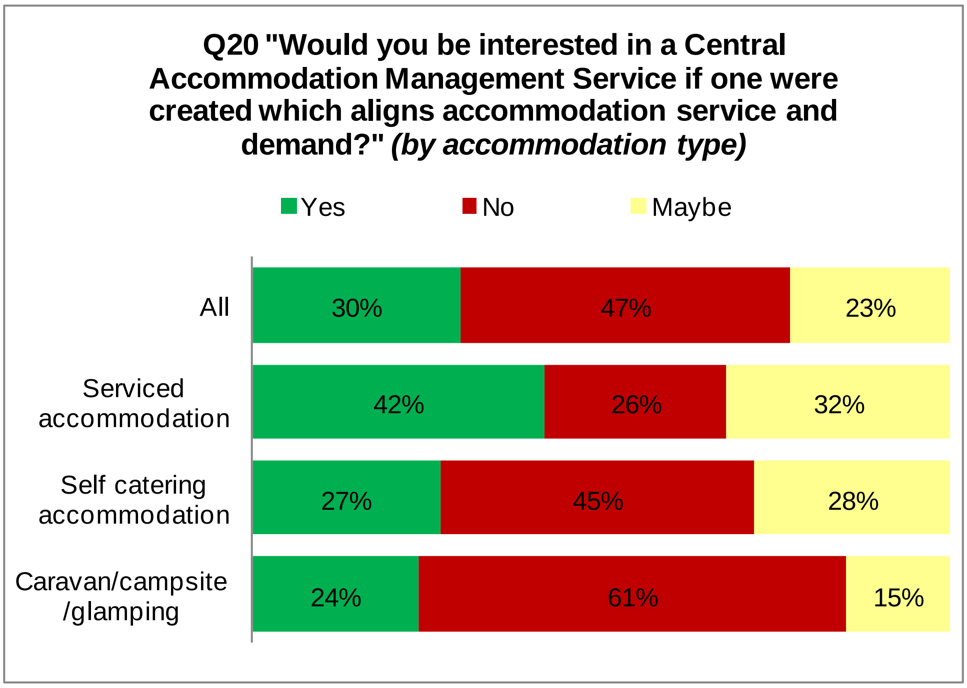
"We're constricted to Caravan Club members."
Caravan / campsite/ glamping, 0-2 employees

Others don't want to jeopardize their tourism business

4.14 Some businesses (10%) don't want to disappoint their regular visitors by being 'block booked' by construction workers.

"Accommodating the workers in the long term could disappoint returning guests, and potentially make them book elsewhere from then onwards."
Serviced accommodation, 0-2 employees

Interest in a Central Accommodation Service



Base: 267 respondents

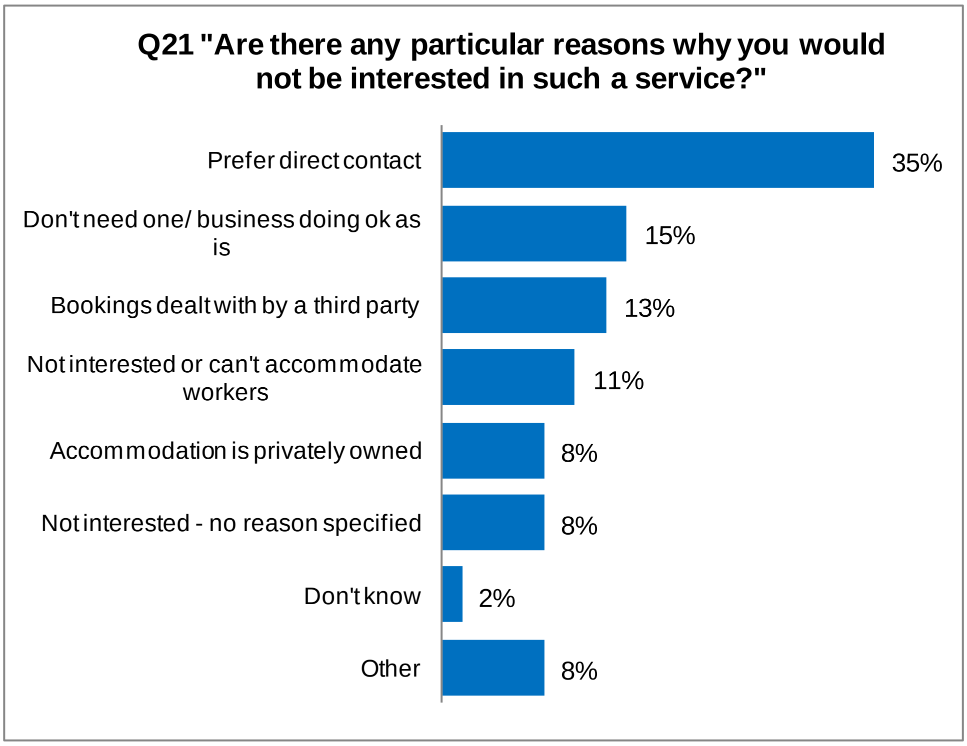
One in three providers are interested in this service

4.15 A further 23% are 'maybe' interested and could potentially be convinced to sign up to this service.

4.16 Serviced accommodation providers are most interested type of accommodation – 42% are interested and 32% are 'maybe' interested. Serviced accommodation providers also show the most interest in accommodating construction workers (82%) compared to other accommodation types.

4.17 Similarly, caravans/campsites/glamping show the least interest in this service (24%), but are also the least interest in accommodating construction workers (35%).

Reasons for not being interested in such a service



Base: 120 respondents; those not interested in a central service

Some prefer direct contact over a Central Accommodation Management Service

4.18 The most common reason for not being interested in such a service is that some providers prefer to deal directly with their customers (35%).

"Prefer to deal with people directly, more personalised service and works better with returning guests."
Self catering accommodation, 0-2 employees

"Prefer to deal with bookings direct- have good returning customers."
Caravan / campsite/ glamping, 10+ employees

4.19 The second most common reason is that some providers feels they don't need such a service (15%). Many of these say they have never had such a service, and have coped fine, so don't see a need for one now.

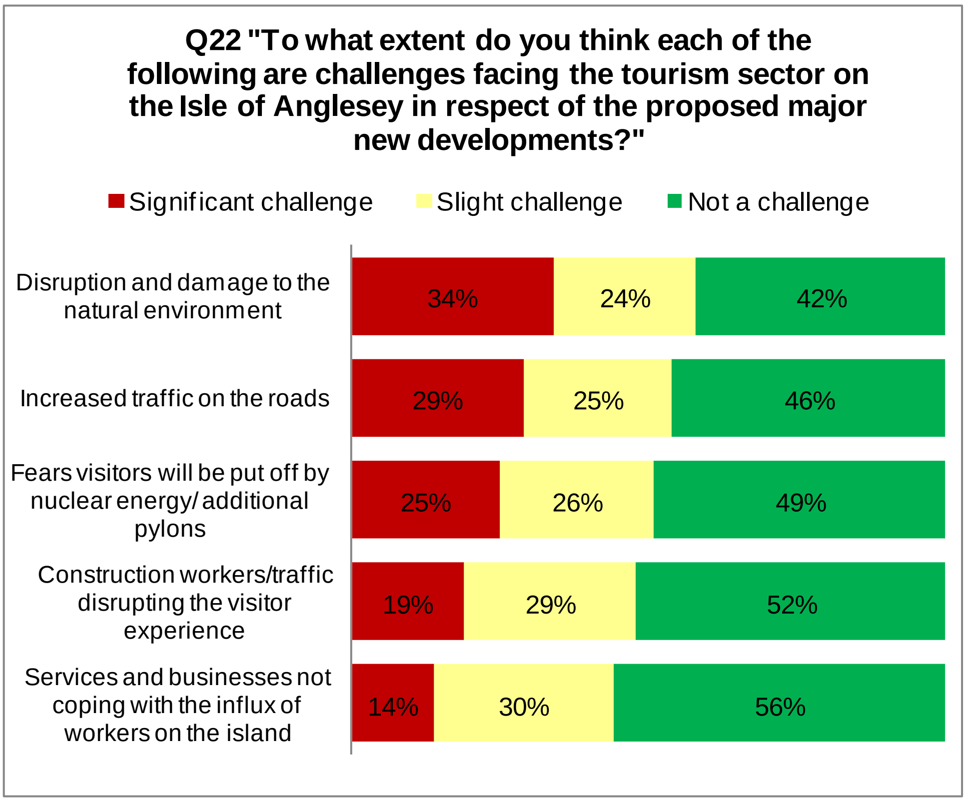
"The business is doing well at the moment without any service."
Self catering accommodation, 0-2 employees

4.20 For others, their bookings are dealt with by a third party (13%). These include booking.com, Sykes, or Menai Cottages.

"Enough bookings through boooking.com."
Serviced accommodation, 10+ employees

"We receive enough bookings through booking.com and through promotions on our website."
Self catering accommodation, 0-2 employees

Challenges in respect of the proposed developments



Base: 267 respondents

Disruption and damage to the natural environment seen as the most significant challenge

4.21 Anglesey is a destination that offers spectacular beaches and coastline, walks in areas of outstanding natural beauty, and access to nature. Disruption and damage to this environment is seen as the most significant challenge (34%) facing the Island in respect of the proposed developments.

4.22 Combining those who say this is a ‘significant challenge’ with those who say it’s a ‘slight challenge’ shows that 58% of providers feel this will be a challenge to some degree.

Final comments: Opportunities for the Island

4.23 Providers were asked what opportunities they have in promoting Anglesey as a tourist destination. The most common themes are discussed below.

Anglesey has natural beauty in abundance

4.24 The most commonly mentioned opportunity is that Anglesey has so much natural beauty to offer. These providers feel that there are opportunities to further promote Anglesey as an area of outstanding natural beauty.

"Opportunities to promote Anglesey are bird watching, and nature walks because of the landscapes and wildlife in Anglesey."
Self catering accommodation, 3-9 employees

"Opportunity for promoting is to target walking enthusiasts."
Serviced accommodation, 0-2 employees

4.25 Many providers feel that once visitors arrive, the Island almost sells itself with its natural beauty.

"Anglesey sells itself, area of outstanding natural beauty."
Self catering accommodation, 0-2 employees

"Anglesey promotes itself"
Self catering accommodation, 3-9 employees

Anglesey is better known than in previous years

4.26 Some providers say that Anglesey is better known than ever before.

"Anglesey has a better profile than before, the island is being promoted more than it has in previous years."
Bunkhouse, 0-2 employees

4.27 Many providers feel this is due to better TV coverage of Anglesey, such as from the BBC television programme 'Countryfile', or the 'The Strait' on ITV.

"A lot of TV programmes recently (like Countryfile) have shown Anglesey as a beautiful area, this could attract a lot more people to the Island."
Caravan / campsite/ glamping, 0-2 employees

"Television programmes have promoted Anglesey's natural beauty and attracted more tourism."
Serviced accommodation, 0-2 employees

4.28 Others say that awareness of the island has increased because of Prince William and Kate living there.

"Will and Kate living on Anglesey has brought more attention to the Island."
Serviced accommodation, 0-2 employees

"Prince William and Kate have increased publicity of Anglesey in the past few years."
Serviced accommodation, 0-2 employees

"There was good promotion when Prince William lived in Anglesey, guests would often enquire about that."
Serviced accommodation, 0-2 employees

Other opportunities

4.29 These include opportunities to turn visitors into returning visitors, an increase in good food and drink produce and outlets on the Island, and jobs resulting from the proposed major developments.

"An opportunity for Anglesey is returning visitors, guests often become regulars after visiting Anglesey the first time."
Caravan / campsite/ glamping, 0-2 employees

"Opportunities include better places to eat locally in recent years."
Self catering accommodation, 0-2 employees

"Power plant will be a massive employer so let's get on with it."
Self catering accommodation, 3-9 employees

Final comments: Challenges for the Island

4.30 Providers were asked also asked what challenges they have in promoting Anglesey. The most common themes are shown below.

Some providers want more promotion of the Island

4.31 One of the other most common challenges, or requests, is from providers who want more promotion of the Island.

"A challenge is that a limited amount of people know about Anglesey as a tourist destination."
Self catering accommodation, 3-9 employees

"Promote the industry better in Anglesey. Try and have a reputation like Cornwall. We're just as beautiful as Cornwall but there's a lack of awareness."
Self catering accommodation, 0-2 employees

"Surprised how few people come to Anglesey - more from USA than from South Wales?"
Serviced accommodation, 0-2 employees

4.32 Some providers comment on *where* Anglesey should be promoted, such as through social media or journalistic reviews. Other comment on *how* it should be promoted, for example, the natural beauty mentioned previously.

"Social media is a good opportunity for promotion."
Self catering accommodation, 0-2 employees

"The Welsh culture could be promoted more in advertising of Anglesey. Anglesey should be promoted more in Wales. Many visitors come from England, very little come from Wales."
Caravan / campsite/ glamping, 0-2 employees

"Anglesey should be promoted based on the landscapes, wildlife and history."
Self catering accommodation, 0-2 employees

Better transport infrastructure

4.33 One of the other main challenges mentioned is the effect that these developments will have on the roads. As shown on p.27, 54% of providers feel that increased traffic on roads will be a significant or slight challenge.

"One challenge would be that the A55 road makes the trip unappealing to potential guests."
Serviced accommodation, 0-2 employees

"A challenge is the amount of traffic on the bridge. Brexit could possibly make this problem worse."
Self catering accommodation, 0-2 employees

"I think it's going to be a nightmare - 10,000 workers going past my drive - notorious road for accidents."
Caravan / campsite/ glamping, 3-9 employees

Other challenges

4.34 These include better public facilities, the pylons and Wylfa Newydd itself being a challenge, the closure of Tourist Information Centres, and more indoor activities on the Island.

"Toilets need to be open throughout the winter for walkers of the coastline."
Self catering accommodation, 0-2 employees

"Appearance of pylons."
Self catering accommodation, 0-2 employees

"I have noticed less tourist information contact and the libraries - people don't know where to go for info."
Serviced accommodation, 0-2 employees

"Another challenge is opening more businesses that offer activities on wet days."
Self catering accommodation & Caravan / campsite/ glamping, 0-2 employees

5. Bedstock and Capacity

5.1 This section summarises accommodation capacity based on survey responses and extensive and detailed desk research activities to give as accurate a picture as possible of the number of accommodation providers and bed spaces available on the island.

5.2 A key gap in the survey respondents was the self-catering sector. This was because it was virtually impossible to identify the contact details of those who rent out properties in this way without having access to council tax details or other official data, which is was not possible to obtain for this project.

5.3 The self-catering sector is much more extensive on the Island than the responses gathered in the survey and a number of third party websites and agents are key operators in this sector including Hoseasons, Quality Cottages, Coastal Cottages, Menai Holiday Cottages and AirBnB.

5.4 Contact details of the owners of properties advertised through these routes are commercially sensitive and very difficult to identify. In most cases, this is not possible and often, particularly on sites such as AirBnB, even identifying the name and precise location of an accommodation unit can be very difficult.

5.5 Where possible, we have identified properties not covered in the survey and estimated the number of bed spaces they account for through desk research. This involved a very detailed process of merging and de-duplicating some 1,500 records to arrive at the figures below.

5.6 Inevitably, there will be properties which have not been covered where it is impossible to identify details or where they do not advertise on the sites reviewed.

5.7 If we were unable to verify details either through desk research or telephone interviews, properties have been excluded from the calculations. In total, we have used additional data from over 800 properties or providers to compile the desk research analysis. The results of the desk work have been combined with data from the survey respondents to produce the analysis below:

Serviced Sector Capacity

Serviced sector capacity	From survey	From desk research	Total
Bedrooms	741	89	830
Bed spaces	1601	171	1772

Caravan and Camping Capacity

Caravan and camping capacity	From survey	From desk research	Total
Pitches (excluding tents)	5,376	608	5,984
Estimated bed spaces	23,862	2,405	26,267
Tent pitches from survey	890	Not estimated	N/A

Self Catering Capacity

Self catering capacity	From survey	From desk research	Total
Units	647	823	1,470
Bed spaces	3,195	4,609	7,804

Estimated bed spaces – all sectors

5.8 Excluding tents, there are an estimated 35,800 bed spaces on the Island and 73% of these are based in camping and caravanning accommodation with 5% in serviced and 22% in self catering properties:

Estimated bed spaces by sector	From survey	From desk research	Total
Serviced	1,601	171	1,772
Camping & caravanning (excluding tents)	23,862	2,405	26,267
Self catering	3,195	4,609	7,804
Total	28,658	7,185	35,843

6. Final thoughts and implications

Few issues in housing workers during winter	Accommodating construction workers doesn't appear to be an issue for some providers during the off-season. Occupancy can be as low as 40%-42% and the many providers who are interested in accommodating workers are happy to do so during this period. However, roughly three in ten providers are closed during this period and may need to be convinced to stay open during this time should their accommodation be considered suitable.
But housing workers during the summer needs careful consideration	As probably expected, the issue is during the high-season where occupancy can be as high as 85%. Whilst the majority of providers who are interested in accommodating workers say they are still happy to do so during July and August (78% say this), there is certainly need for careful consideration as to whether they will have capacity to house *enough* workers during this time. Higher occupancy is seen as the main benefit of housing workers, but when occupancy can be as high as 85% during the summer, there may be stresses on providers if they constantly reach maximum occupancy during this time.
Serviced accommodation providers are the most amenable	Serviced accommodation providers are by far the most interested in housing workers compared to self catering and caravans and camping providers. They are also most interested in a Central Accommodation Management Service. Serviced providers, however, is the sector which as least bed space capacity overall.
Opportunity for further employment	1,554 FTE staff are employed by the 262 providers that provided figures. This will increase further if the providers that close during winter can stay open as a result of regular income. In fact, keeping seasonal staff on for longer, or even employing more, is seen as a key benefit of accommodating workers.
Bed space capacity may not meet the needs of workers	As highlighted above, the bed space capacity is dominated by camping and caravan capacity. Many of these are for privately owned static caravans or tourers. These may be unsuitable or inaccessible to workers either due to availability or preference. Self catering stock, particularly through third party providers, may offer suitable accommodation, however, pricing and fears about putting off tourists during high season are likely to be an issue.
Progress has been made in the tourism sector, but challenges lie ahead	Many providers say that Anglesey is better known and prospering more than ever before thanks to recent TV coverage such as Countryfile and The Strait, but also from the Duke and Duchess of Cambridge living there. There are some challenges that providers feel could affect this. Most notably, 58% of providers feel that disruption and damage to the environment is a challenge.