

From: [PMO](#)
To: [Wylfa Newydd](#)
Subject: RE: IACC Deadline 2 Submission : Local Impact Report - WNDA (email 25)
Date: 04 December 2018 20:14:18
Attachments: [image001.png](#)
[image002.png](#)
[image003.png](#)
[Wylfa Newydd Development Area.pdf](#)
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Please note, a number of emails will follow in relation to the LIR – we will confirm the final email.

Pnawn Da/ *Good afternoon,*

Gweler ynglwm 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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Mae cynnwys y neges e-bost hon yn cynrychioli sylwadau'r gyrrwr yn unig ac nid o angenrheidrwydd yn cynrychioli sylwadau Cyngor Sir Ynys Mon. Mae Cyngor Sir

Ynys Mon yn cadw a diogelu ei hawliau i fonitro yr holl negeseuon e-bost trwy ei rwydweithiau mewnol ac allanol.

Croeso i chi ddelio gyda'r Cyngor yn Gymraeg neu'n Saesneg. Cewch yr un safon o wasanaeth yn y ddwy iaith.

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ANGLESEY VISITOR SURVEY 2012

Report

NOVEMBER 2012





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APPENDIX

Questionnaire

1. EXECUTIVE SUMMARY

- A total of 499 **face to face interviews** were conducted across ten sites in Anglesey between August and October 2012.

PROFILE OF VISITORS

- **Visitors from the UK (outside Wales) account for three quarters of all visitors to Anglesey** with the majority based in the North West of England. Visitor origins are closely clustered around major road networks of the A55, M6 and M56.
- **Nearly half of all visitors to the region are *Empty Nesters*** (aged 55+, no children in household) making it the largest visitor segment. In August, however, this segment is on a par with *Families*.
- **Anglesey visitors are predominantly ABC1:** just over half of the UK population fall into these top socio-economic grades while three quarters of visitors to Anglesey are ABC1.

PROFILE OF THE VISIT

- **Staying Visitors are in the majority in Anglesey** with nearly four in five visitors staying overnight as part of their trip. Of these 7% are on a Staycation – that is they have substituted a holiday abroad for a holiday in the UK.
- **Anglesey attracts a high degree of repeat visits:** nine in ten have visited the region before. The likelihood to revisit is also high with 85% saying they *definitely will* revisit and 12% saying they *probably will* in the next few years.
- **The natural landscape is the main motivation for visiting:** two thirds say this is their *main reason*. The Wales Coast Path plays an important part of the motivations to visit with nearly a third making use of the path.

RATING THE VISIT

- **Four in five visitors to Anglesey are *Promoters*:** that is they have a high degree of attachment to the region which has gone beyond satisfying their needs, they are likely to recommend the region and are likely to return. The *Net Promoter Score* for the region (based on the proportion of Promoters, Passives and Detractors) is on a par with Cornwall.
- **The *Friendliness of people*** is the highest rated element of the trip with half of all visitors rating it 10/10. The least highly rated element (but still overall seen as positive) was *places to eat and drink* with only one in five rating Anglesey 10/10 for this element.

COASTAL FACILITIES

- **Investment in coastal facilities has paid off** with three in five visitors who have been to Anglesey before noticing an improvement. This is higher amongst visitors on a trip with someone who has a disability: two thirds noticed an improvement to coastal facilities.
- **The *footpaths and Wales Coast Path*** are the most-mentioned elements that visitors spontaneously mentioned that they liked about coastal facilities, followed by *parking and access*.
- ***Improving toilet facilities – cleanliness and availability – is the most-mentioned aspect that needs attention*** with a quarter of all visitors spontaneously mentioning this.

ACCOMMODATION

- **Over four in five Staying Visitors to Anglesey stay in Anglesey** with the most mentioned locations being Holyhead, Beaumaris and Rhosneigr.
- **The most-mentioned types of accommodation were *static caravans*** (30% stayed in this accommodation type) followed by *self-catering cottage* (17%).
- **Satisfaction with accommodation is high:** just over half rated their overall satisfaction with their accommodation as 10/10.

2. INTRODUCTION AND OBJECTIVES

Anglesey County Council, in association with The Tourism Company, commissioned Beaufort Research to conduct a research study amongst overseas and UK visitors to Anglesey, both Staying and Day, between August and October 2012.

The overall aim of the study was:

To gain an up to date profile of visitors, to gauge visitor attitudes and to measure visitor satisfaction across a range of aspects towards their visit.

Specific objectives were:

- To investigate the profile of visitors to Anglesey
(For example age, lifecycle, party size, gender, disabilities)
- To analyse motivations for choosing Anglesey
(For example perceptions, past experiences, proximity)
- To understand the nature of their trip
(For example activities undertaken, transport, accommodation type)
- To measure attitudes and obtain ratings regarding the visitor experience
(For example sense of place, range of facilities)
- To compare pre-visit expectations and attitudes to the actual experience
- To investigate factors such as emotional proximity with Anglesey and future intentions to visit

3. METHODOLOGY

The research universe was classed as those aged 16 or over, on a trip to/ in Anglesey either as a Staying or Day Visitor. The purpose of the trip was defined as *not* to go shopping or attend a routine appointment, on business or for study.

- For **Day Visitors** the respondent must have spent three or more hours away from home, including travel.
- For **Staying Visitors**, the respondent must have spent a certain number of nights in Wales, according to the length of their overall stay.

A total of 499 interviews were conducted face-to-face at ten interview points across the region.

INTERVIEW LOCATION	Volume of interviews
Holyhead Breakwater Park	49
Dingle Llangefni	13
Porth Dafarch	49
Traeth Bychan	51
Beamuaris Pier	79
Cemaes Bay	42
Rhosneigr	51
Treaddir Bay	67
Oriel Ynys Môn	54
Llanddwyn	44
TOTAL	499

No quotas were applied to the proportions of Day and Staying Visitors to enable the results to fall out naturally and obtain a profile of the visitor and their trip type.

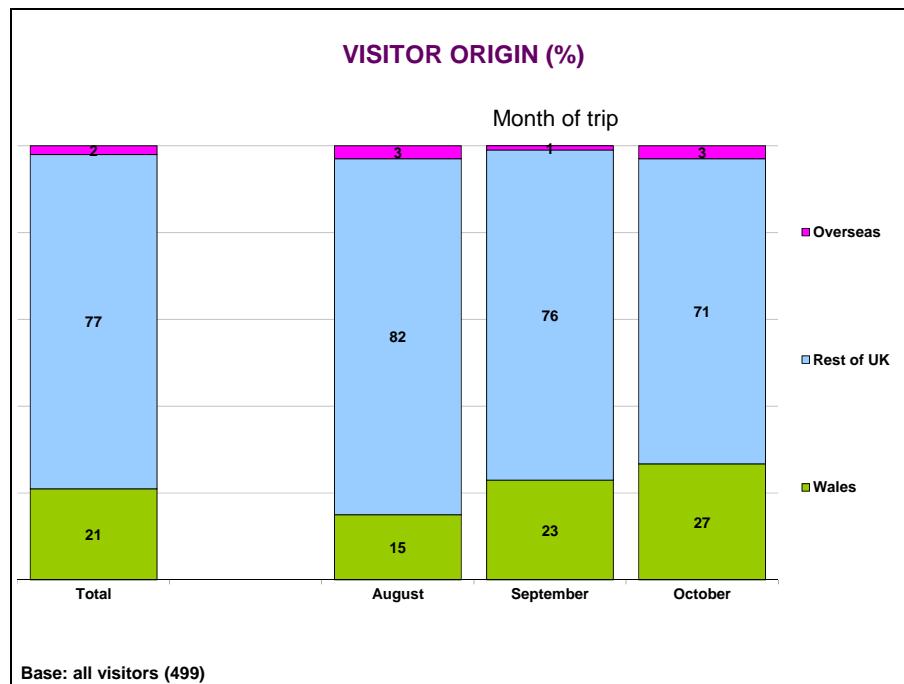
4. MAIN FINDINGS

The findings are discussed in individual areas: the visitor profile, the profile of the visit itself, rating Anglesey, coastal facilities and accommodation.

4.1 Profile of Visitors

Looking firstly at the origin of visitors to Anglesey, Chart 1, below, shows that over three quarters (77%) of visitors to Anglesey are from the rest of the UK (outside Wales) with visitors from Wales making up 21% of the visitors. Overseas visitors account for 2% of all visits.

Chart 1



Looking at visitor origin by month of interviewing there is a clear trend for a decrease in visitors from outside Wales as the peak season gives way to autumn: the proportion of visitors from within Wales itself increases from 15% (August) to 27% (October).

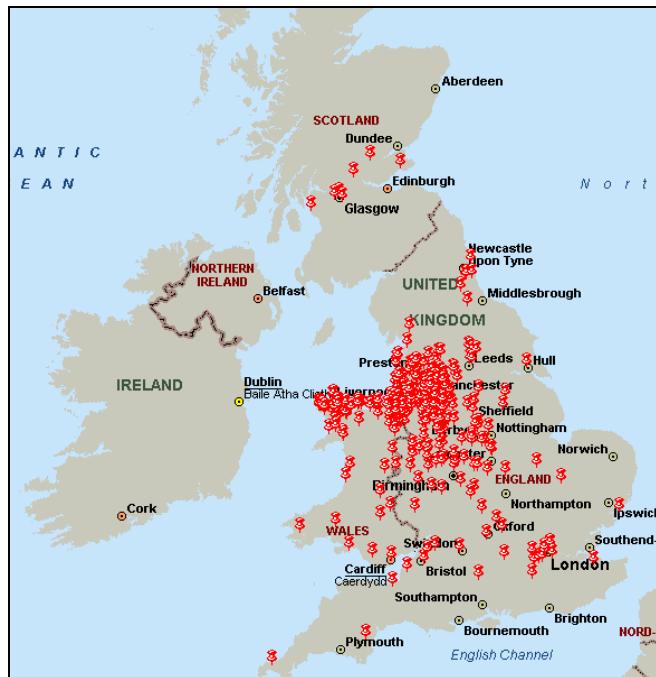
When looking at the results at site level caution needs to be applied as individual sample sizes can be very small. There are trends indicated in the data, however, that sites such as *Dingle Llangefni* and *Oriel Ynys Môn* attract a greater proportion of visitors from within Wales than the other sites included in the visitor survey.

Across the region as a whole those visitors from the UK (outside Wales) are mainly drawn from geographically close regions:

- North West England (66% of all UK visitors outside Wales)
- West Midlands (9%)
- East Midlands (6%)

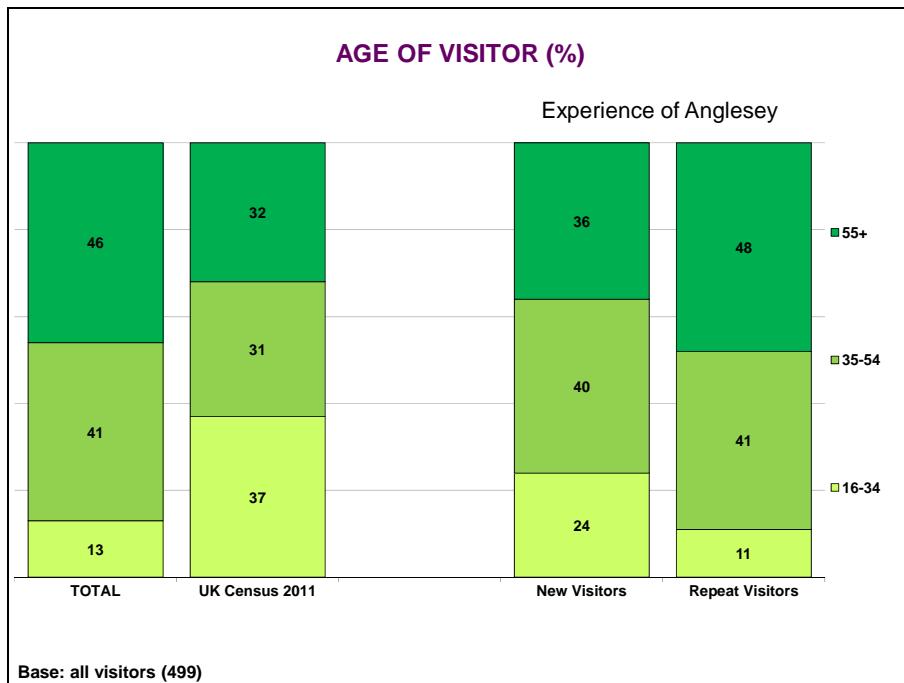
To better illustrate the origin of UK visitors the map below records the postcode of visitors to Anglesey, clearly clustered around the major road networks of the A55/ M6 and the M56. Interestingly it also shows the relatively low incidence of visitors from the highly populated and still relatively close West Midlands (which, in nearby Denbighshire, account for just over 20% of visitors).

Map 1 Origin of visitors to Anglesey from the UK (including Wales)



The age of visitors is shown in Chart 2, below, with a comparison against the UK Census data 2011. The results show that Anglesey attracts an older profile of visitor compared to the UK population, with just 13% falling into the 16-34 age group (compared to 37% of the UK population).

Chart 2



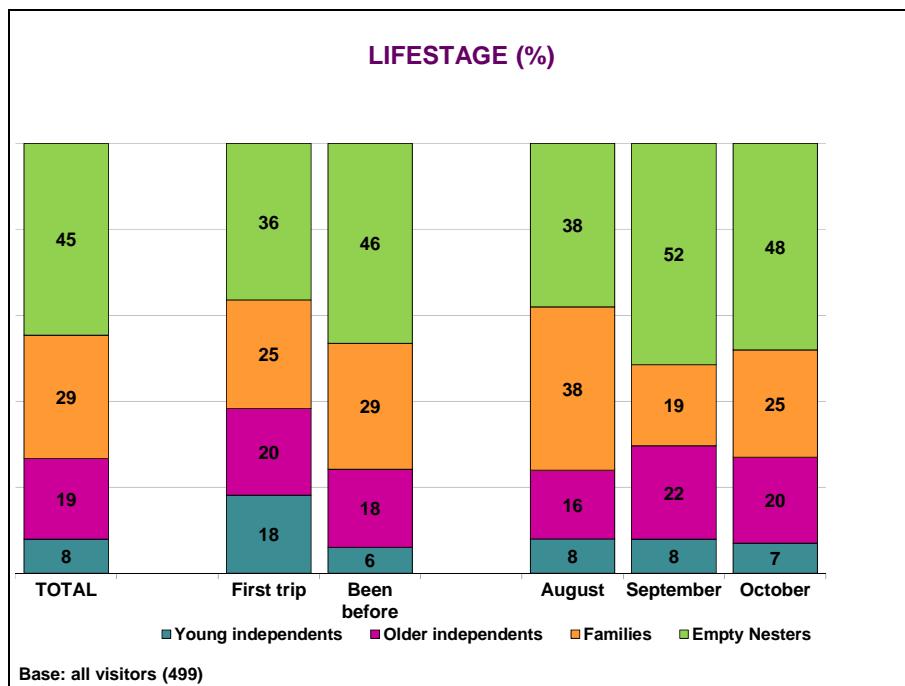
Interestingly, visitors who are new to Anglesey have a younger age profile: 24% of those who are new to the region are aged 16-34 – double the proportion amongst repeat visitors.

Building on age profiling comes the *lifestage* profiling of the visitors and this is captured using Visit Wales' segmentation:

- Young Independents (aged <35, no children in household)
- Older Independents (aged 35-54, no children in household)
- Families (any children in household).
- Empty Nesters (aged 55+, no children in household)

The chart, below, shows how the lifestages break down in Anglesey.

Chart 3



The largest segment of visitors to Anglesey are *Empty Nesters*, accounting for 45% of all visitors across the region, followed by *Families* (29%). As seen in the age breakdown (Chart 2) those visitors on a first trip have a markedly different profile to repeat visitors, with a higher proportion of *Young Independents* (18% compared to 6% amongst repeat visitors).

Looking at the data by the month of interview the proportion of *Families* dominated August (accounting for 38% of all visitors – on a par with *Empty Nesters*) but declined to 19% of all visitors in September (once the new school term has started). In October (in line with half term school holidays) the proportion of *Families* increased slightly to 25%.

Social Grade is another way in which to profile visitors, using a classification based on occupation. The classifications are as follows (with universe figures from the National Readership Survey 2010):

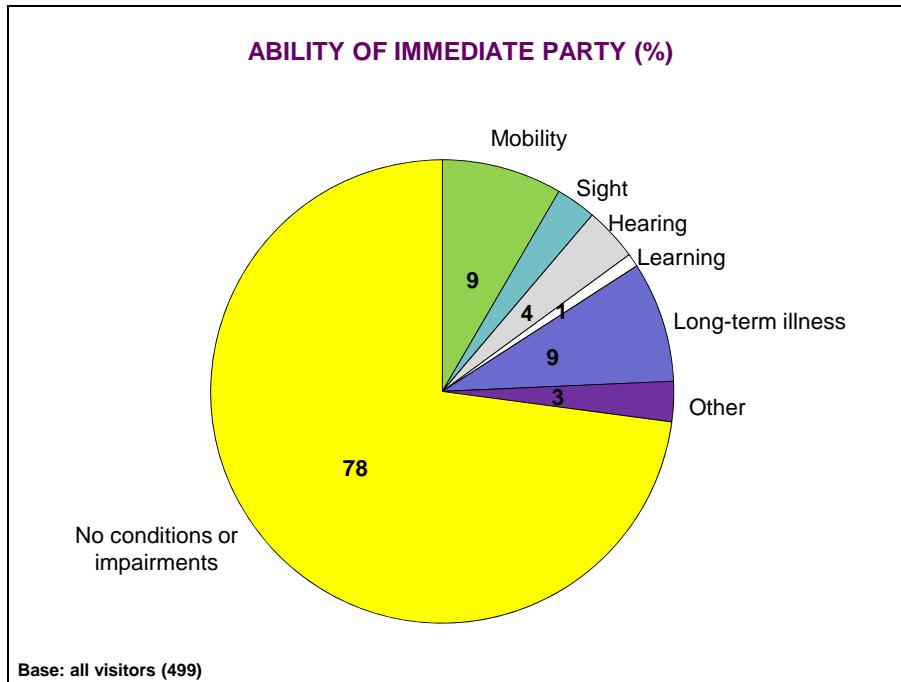
		% of population
A	Higher managerial, administrative and professional	4%
B	Intermediate managerial, administrative and professional	22%
C1	Supervisory, clerical and junior managerial, admin and professional	29%
C2	Skilled manual workers	21%
D	Semi-skilled and unskilled manual workers	15%
E	State pensioners, casual and lowest grade workers, unemployed on benefits	8%

While the profile in the UK shows 55% of the population are in the ABC1 social grade, 74% of visitors to Anglesey are in this group. Looking at the data by month of interview, as the season moves on the proportion of visitors in the higher social grade increases: up from 70% in August, to 75% in September and 78% in October.

Turning to look at the immediate party of the visitor over three quarters (78%) are on a trip with no-one in the immediate party who has a disability of any kind (see Chart 4, following). Nearly one in ten (9%) are on a trip with someone with a mobility disability and 9% are on a trip with someone with a long term illness that is limiting.

Looking by location of interviewing the data indicates *Dingle Llangefni, Traeth Bychan* and *Cemaes Bay* have the highest proportions of parties that include someone with a disability - accounting for around a third of all parties.

Chart 4



The profile of visitors also includes a technology profile with over two thirds of visitors (67%) on a trip with some in their immediate party who has a handheld device for accessing the internet: highest amongst *Young Independents* (84% have mobile internet access) and lowest among *Empty Nesters* (but nevertheless 52% have access). Of those who did have access to the internet during their trip three in five (60%) accessed the internet to find out information during their trip, demonstrating the importance of mobile-accessible information sources.

4.2 Profile of the visit

In this section of the report the nature of the visit will be explored including the trip type, the motivations for visiting the region and the transport used while on the trip).

4.2.1 Experience of Anglesey

The majority of visitors in the region have visited Anglesey before: just 11% are new visitors.

Looking by location *Porth Dafarch* and *Llanddwyn* appear to attract the highest proportions of new visitors in the region.

Day Visitors are slightly more likely to be new to Anglesey (15% have not visited before) compared to Staying Visitors (of whom 10% are new to the region).

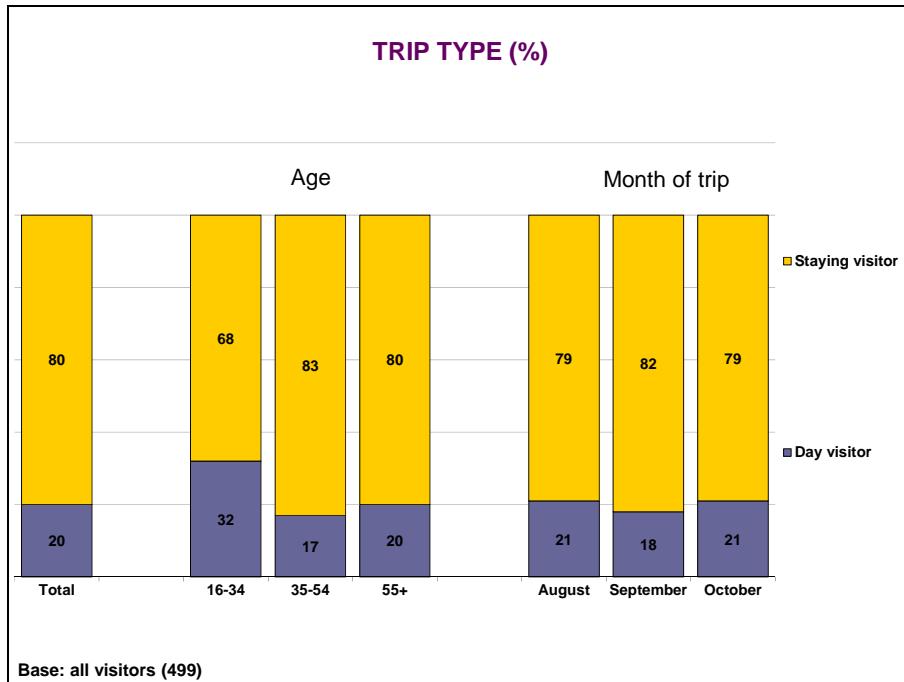
There is a high degree of loyalty amongst repeat visitors:

- Amongst those **Staying Visitors** who have been to the region previously nearly two in five (38%) have visited more than twenty times in the last three years.
- Amongst the **Day Visitors** a similar proportion (37%) have visited more than twenty times in the last year.

4.2.2 Type of trip

Turning to the type of trip itself one in five (20%) of visitors to the region are on a day trip: with day trips more popular amongst those aged 16-34 (32% are on a day trip).

Chart 5



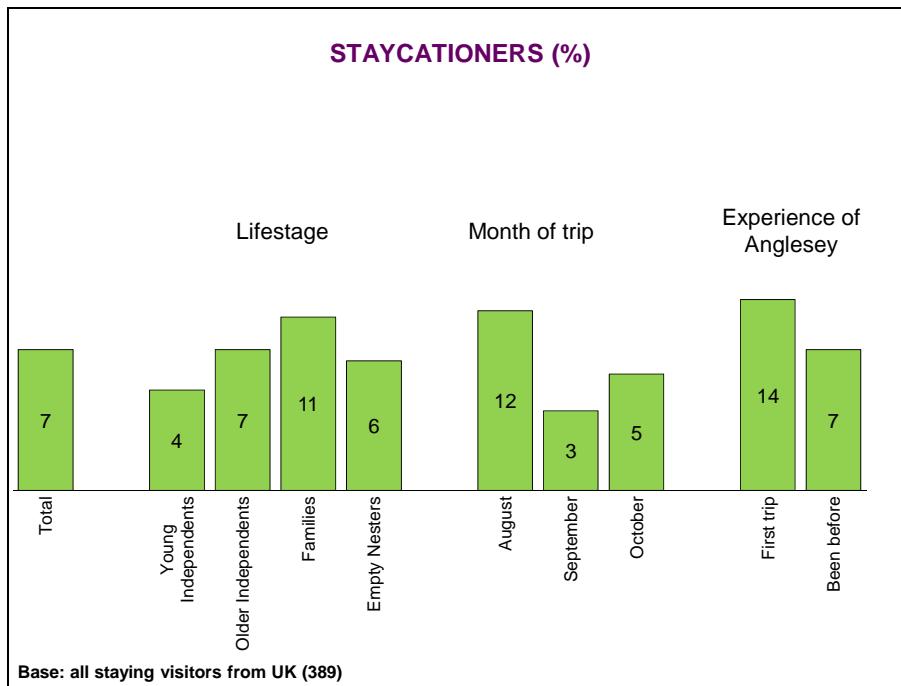
Interestingly the profile of trip type remains relatively unchanged across the three months, with Day Visitors accounting for just over one in five (21%) of visitors in August and October, and just under one in five (18%) in September.

Amongst those on a staying trip to Wales the average number of nights stayed is 5.9: highest in the peak summer month of August (8.1 nights) and declining as the season progresses (4.7 in September, 3.8 in October).

The majority of Staying Visitors to Anglesey classify themselves as being on a *short break* (59%) with nearly one in five (19%) classifying their trip as a *secondary/ additional holiday* and just 14% as a *main holiday of the year*.

The survey explored whether the visitors who were from the UK and staying in Wales were on a *Staycation* – that is they have substituted a holiday abroad for one in the UK. The results are shown in the chart below.

Chart 6



Just under one in ten (7%) of visitors to the region had substituted a trip abroad with a trip to Anglesey: highest amongst families (11% were Staycationers). Staycationing appears to be attracting new visitors to the region: 14% of those on a first trip are Staycationers, compared to 7% of those who have visited the region before.

4.2.3 Motivations for visiting Anglesey

When looking at the reasons for visiting Anglesey (all reasons as well as the single main reason) the following table shows top mentions from a prompted list.

Table 1: Reasons for visiting this part of Wales for this particular trip (%)

	All reasons	Main reason
To enjoy the scenery, landscape, countryside, coast	79%	63%
To visit places, historical sites, specific attractions	29%	6%
To take part in outdoor activities	14%	12%
To visit friends and relatives	14%	10%
To attend an event, concert, show, match	7%	4%
Have accommodation here	4%	3%
Other	7%	2%

Base: all visitors (499)

The table shows the importance of the *natural landscape* as a motivator to visiting being by far the most-mentioned reason across the sample as a whole.

Of note is the reason to *take part in outdoor activities* which is the third most-mentioned reason in the list of all reason (mentioned by 14% of visitors) but is the second most-mentioned main reason with 12% citing it as their main reason to visit.

Amongst those whose main reason to visit was the landscape, scenery, countryside the most-mentioned aspect was *visit the beach* mentioned by 88% of this subgroup of visitors. This was followed by *touring/ sightseeing by car* (52%) and *walking the coastal path* (49%). Rebasing this last reason for visiting against the sample of all visitors to the region (not just those whose main reason to visit was the landscape) just under a third (31%) of all visitors to Anglesey have walked or intend to walk the coastal path. This was slightly higher amongst new visitors to the region (36% of new visitors will walk the coast path) compared to repeat visitors (30% have or intend to do so).

4.2.4 Transport

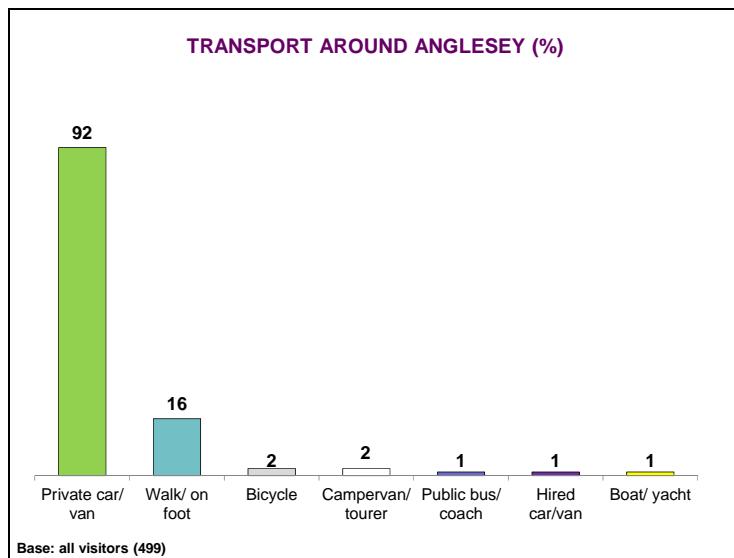
A total of eleven overseas visitors were interviewed and of these the majority arrived in the UK by plane: four to Manchester, two to Heathrow, one to Liverpool.

Of the visitors from the rest of the UK (outside Wales) and overseas the main method of transport used to reach Anglesey was as follows:

- Car (92%)
- Train (3%)
- Campervan/ tourer (2%)
- Hired car/ van (1%)
- Public bus/ coach (1%)

Once in Anglesey transport *around* the region is also dominated by the private car/ van with 92% mentioning this means of transport. A total of 16% walked around the region: walking was mentioned by a greater proportion of younger visitors (23% of those aged 16-34 walked, compared to 20% aged 35-54 and 11% aged 55+). It was also mentioned in greater proportions in October (24% walked) compared to August (13%) and September (12%).

Chart 7



Only seven visitors used public transport during their trip in Anglesey: six of these were aged 55+. Of these users of public transport three rated it 10/10 with two rating it 9/10 and the others rating it 6/10 (1 visitor) and 7/10 (1 visitor).

4.3 Rating Anglesey

This section explores overall ratings for Anglesey as well as ratings and attitudes towards specific trip aspects.

4.3.1 Net Promoter Score

The Anglesey Visitor Survey used a question designed to elicit the Net Promoter Scores (NPS) which measures customer loyalty using the question *how likely is it that you would recommend Anglesey as a place to visit to a friend or colleague?* The scale used runs from '0' (not at all likely) to '10' (extremely likely). Three distinct groups are produced:

Detractors (those who score 0-6). Customers that have generated income but are actually bad for the region over the long haul. They are less likely to buy anything/ visit again and are more likely to spread bad word of mouth and more costly to serve because of their dissatisfaction.

Passives (those who score 7-8). Customers are generally more positive but are significantly less valuable than Promoters. Passives may be satisfied but that may not be in the longer term.

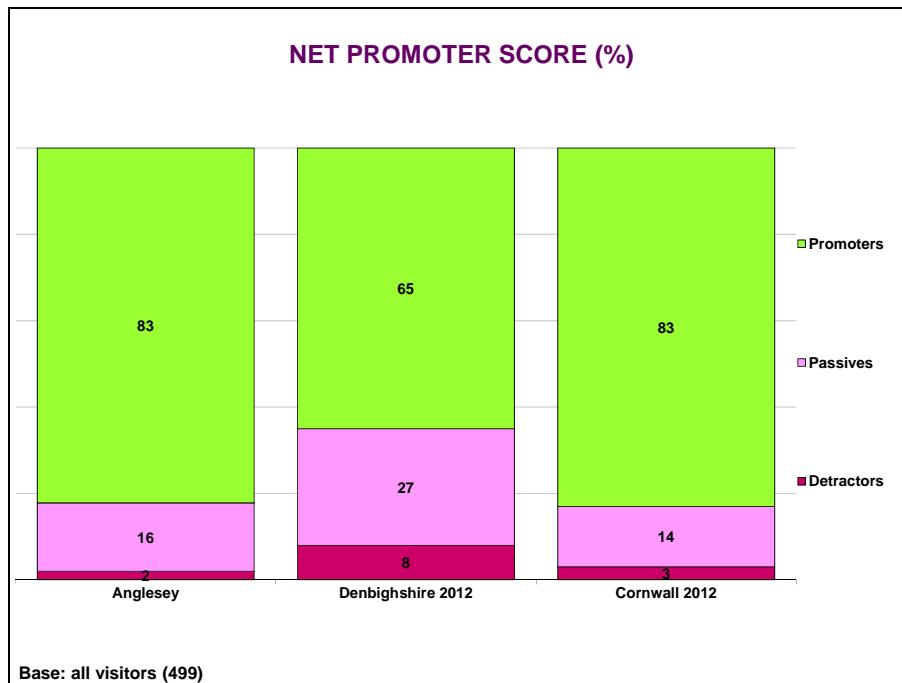
Promoters (those who score 9-10). Customers that drive business growth. The region has gone beyond satisfying their needs and truly delights them. As a result they will be more likely to revisit and to recommend it to many others.

The Net Promoter Score is a simple calculation as follows:

$$(\% \text{ Promoters}) - (\% \text{ Detractors})$$

Across the region as a whole over four in five (83%) are classed as Promoters with 16% Passives and 2% Detractors. This analysis has also been conducted by Beaufort Research in Denbighshire and also in Cornwall and the results of the three areas are shown in the chart below.

Chart 8

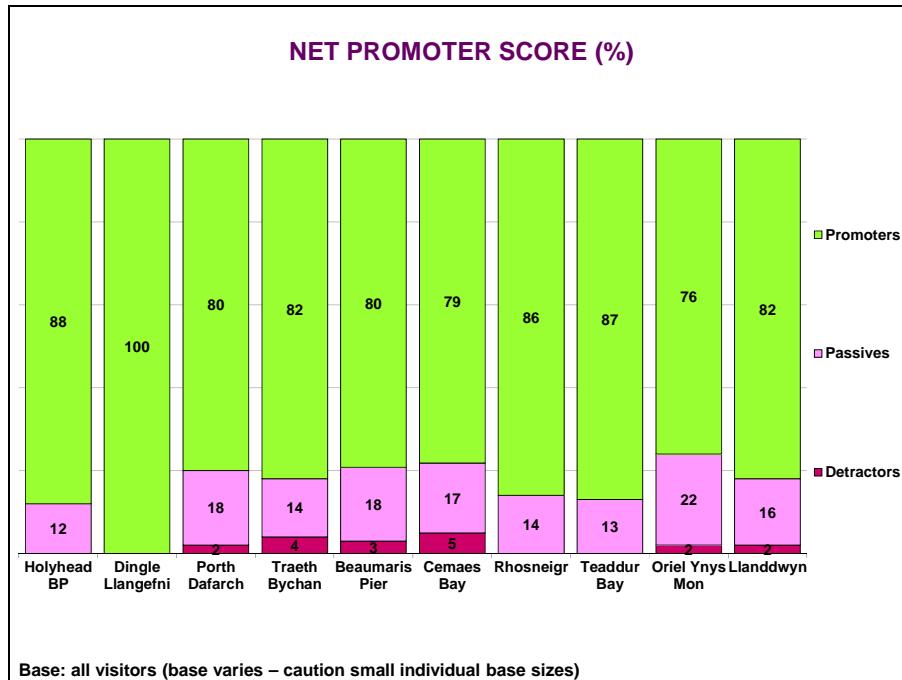


As can be seen, Anglesey's high proportion of Promoters matches that of Cornwall and is well above the proportions seen across the region of Denbighshire.

The Net Promoter Score for Anglesey is therefore 81 (% Promoters – % Detractors), and compares to 57 for Denbighshire and 80 for Cornwall.

The Net Promoter Score can also be looked at by individual locations and these are shown in the following chart. Caution needs to be applied as the individual base sizes are small.

Chart 9

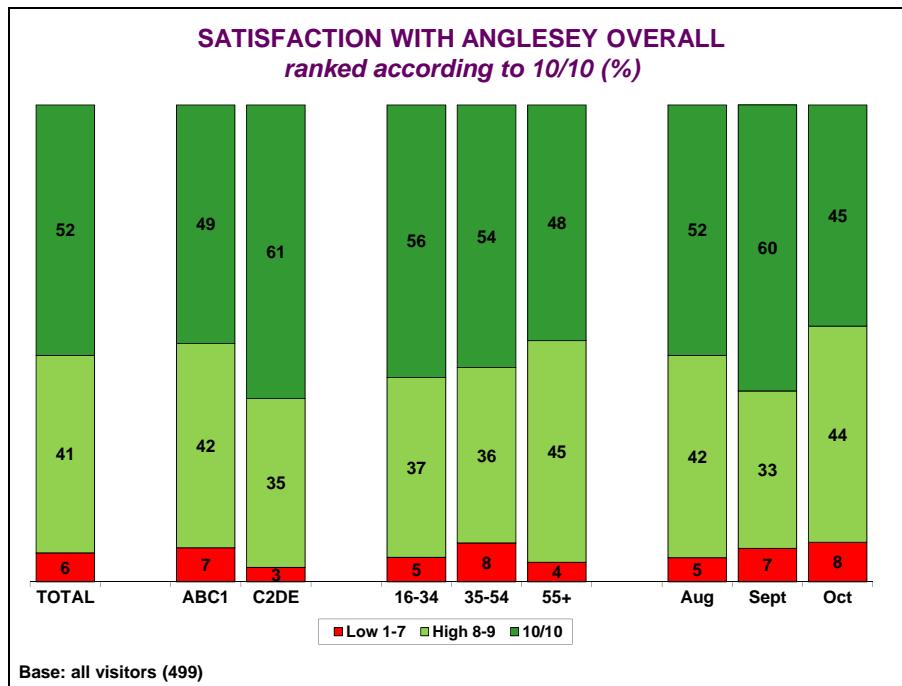


The chart shows that the Net Promoter Scores remain positive for all locations with none falling below a score of 74 (Cemaes Bay, Oriel Ynys Môn).

Satisfaction with Anglesey overall

The visitor survey also used the standard satisfaction questionnaires to gauge visitor experience. Looking at satisfaction *overall* with Anglesey as a place to visit (see Chart 10, below) the levels of satisfaction are very high: over half (52%) rate Anglesey 10/10 with a further 41% rating it highly at 8 or 9 out of 10.

Chart 10

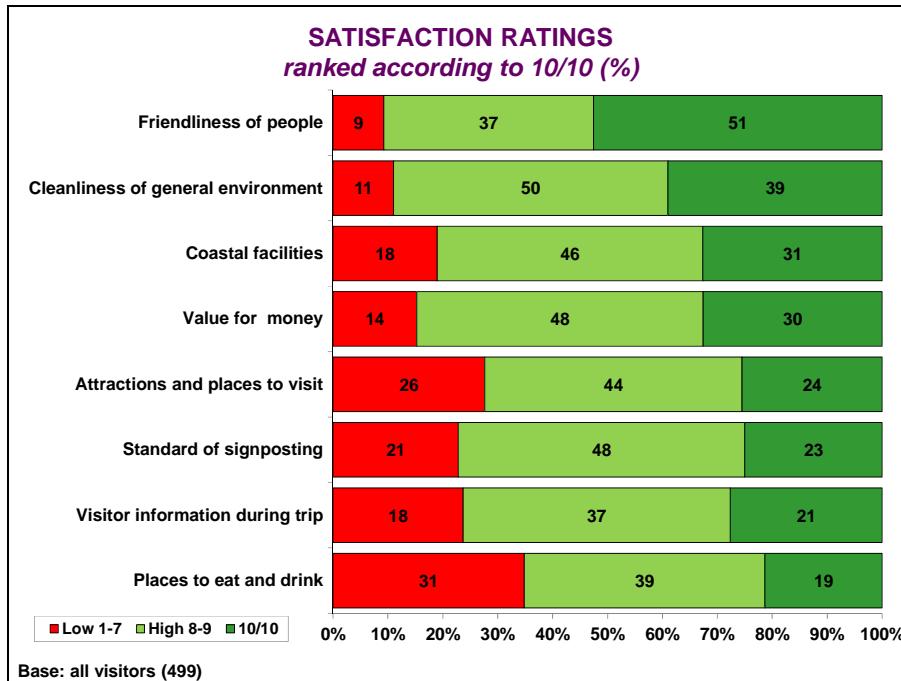


Looking at the subgroups in more detail, those in the ABC1 social grade are a little less positive about Anglesey *overall* compared to those in the C2DE social grade.

Those rating the region 10/10 also declines slightly by age of respondent: 56% of those in the 16-34 age group rated Anglesey 10/10 with 54% of those in the 35-54 age group doing so and 48% of those in the 55+ age group doing so.

The survey explored satisfaction with a number of specific elements of the trip, the results of which are shown in Chart 11, following. The highest ratings were given to *friendliness of the people* with over half (51%) rating this element 10/10 and a further 37% rating it highly at 8 or 9 out of 10.

Chart 11

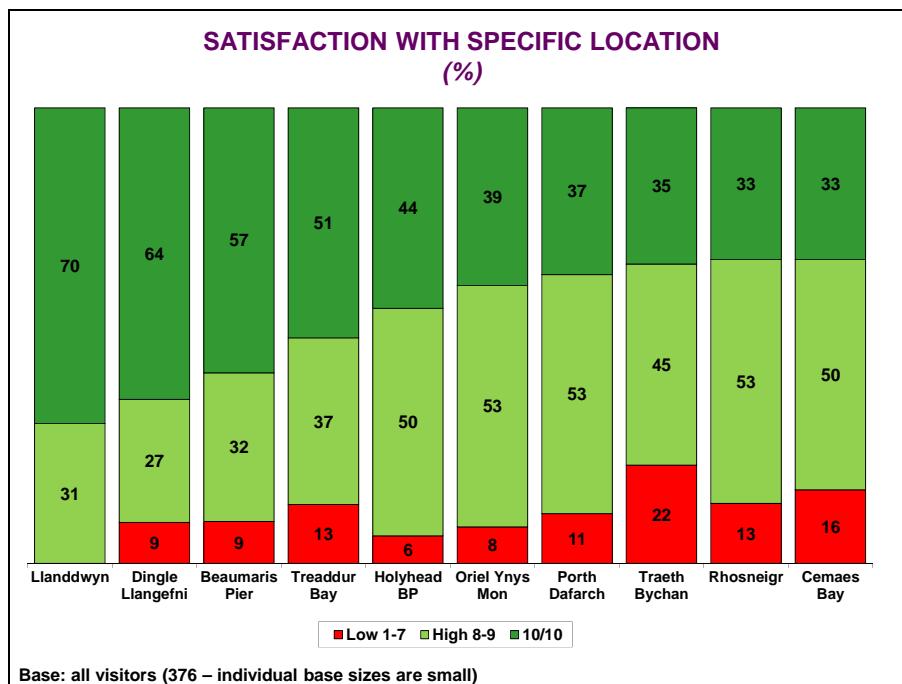


The element that was rated least highly – but nevertheless was positively rated – was *places to eat and drink* – with nearly a third (31%) rating it low (with scores of between 1 and 7 out of 10). Interestingly the mean score for this element was slightly lower in the August and higher out of the peak season in September and October. Those in ABC1 social grade rated *places to eat and drink* lower than those in the C2DE social grade.

4.3.2 Location-specific ratings

Visitors at each of the ten sites used in the visitor survey were asked to rate the site as a place to visit. Ratings were out of ten with 1 = very poor and 10 = excellent. The results are shown below but caution should be applied as some sample sizes are particularly small (In Dingle Llangefni just 13 visitors answered this question).

Chart 12



Seventy percent of visitors to Llanddwyn (base: 23 visitors) rated the location 10/10 as a place to visit, with a further 31% rating it between 8-9/10. This compares to Cemaes Bay where a third (33%) of visitors rated it 10/10 with half (50%) rating it high with 8 or 9 out of 10 and 16% rating it low (base: 42 visitors).

Those visitors giving a rating of 5 or below were asked what improvements they felt could be undertaken to make the location an excellent place to visit. Just seven respondents rated their location 5 or below and their answers are given below for the locations in which they were made:

Dingle Llangefn	Improve access
Porth Dafarch	Toilet facilities
Traeth Bychan	Safety, Refreshments, Parking, Slipways

Those visitors giving the individual locations a rating of 6 or more were asked what the main features were that they particularly liked about the location. The answers are shown in Table 2, following:

Table 2: main features that contributed to giving location a positive rating (top spontaneous mentions)

	TOTAL	Holyhead Breakwater Park	Dingle Llangefn	Porth Dafarch	Traeth Bychan	Beaumaris Pier	Cemaes Bay	Rhosneigr	Tereaddur Bay	Oriel Ynys Môn	Llanddwyn
Landscape/ scenery/ countryside	46%	38%	60%	44%	59%	56%	48%	27%	62%	4%	74%
Beach/ sea	25%	0%	0%	28%	30%	17%	31%	43%	36%	0%	52%
Quiet/ not busy	16%	13%	10%	17%	41%	5%	36%	3%	11%	4%	30%
Refreshment facilities	13%	19%	0%	3%	3%	14%	12%	17%	2%	40%	0%
Clean/ tidy/ no litter	13%	25%	10%	19%	8%	22%	17%	7%	5%	6%	9%
Everything/ lovely/ nice	11%	6%	40%	11%	0%	11%	7%	7%	18%	13%	13%
Footpaths	10%	44%	20%	11%	11%	5%	14%	3%	11%	0%	22%
Art/ gallery/ exhibitions	9%	0%	10%	0%	0%	3%	0%	0%	2%	55%	4%
Parking	9%	25%	10%	17%	3%	6%	14%	3%	4%	9%	9%
Access	8%	6%	10%	19%	8%	6%	7%	7%	9%	4%	0%
Seating/ shelter	7%	0%	0%	11%	11%	19%	5%	0%	4%	0%	0%
Safety	5%	0%	10%	8%	16%	9%	2%	0%	5%	0%	0%
Shops	5%	0%	0%	0%	0%	11%	2%	10%	2%	13%	0%
Toilet facilities	4%	19%	0%	17%	3%	0%	5%	0%	0%	0%	4%
BASE	366	16	10	36	37	64	42	30	55	53	23

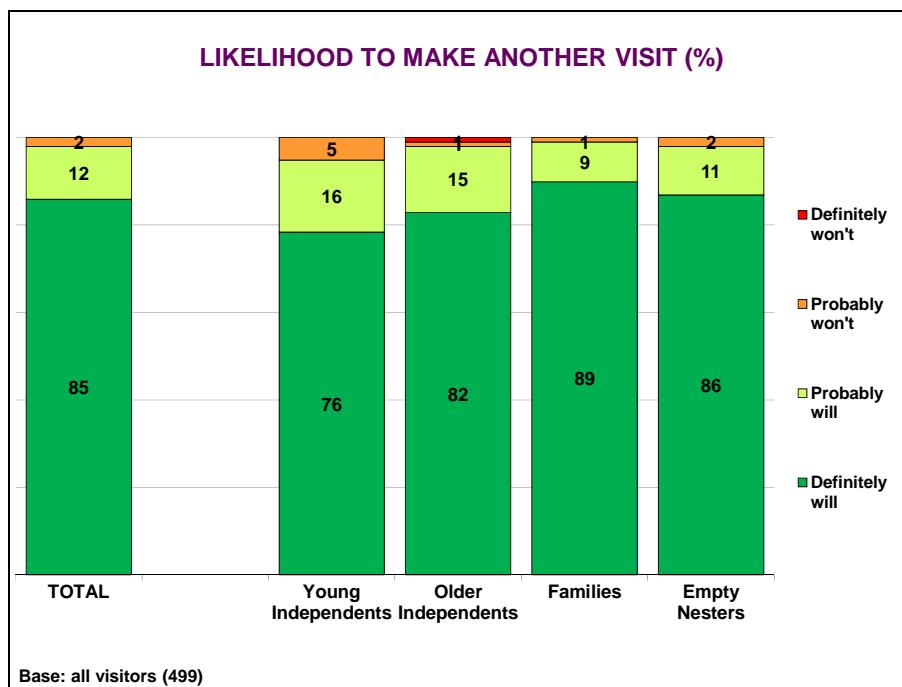
Base: all visitors

4.3.3 Likelihood to return

When asked if they would be likely to make another visit to Anglesey in the future over eight in ten (85%) said they *definitely will* and a further 12% said they *probably will*. Of those who said they *probably/ definitely won't* all were from overseas or the UK outside Wales and therefore *distance* may well play a part in their answer.

Of the respondents who have not visited Anglesey before just under half (44%) said they will *definitely* return to the region, with 42% saying they will *probably* return.

Chart 13



Visitors were asked *to what extent do you feel that your trip gives you a distinct Welsh experience that you were not able to have elsewhere?* A total of 37% believed their trip gave them a *strong Welsh experience* (rising to 44% amongst those aged 55+).

When asked how important the unique Welsh experience was to their trip 66% said it was important to them. Those in the older age group were most likely to consider it an important aspect of their trip (73% of those aged 50+ said a distinct Welsh experience was important compared to 58% of those aged 35-54).

4.4 Coastal Facilities

4.4.1 Improvements to coastal facilities

Those visitors who were interviewed at coastal locations and had previously visited Anglesey were asked if they had noticed improvements to coastal facilities since their previous visit. Very positively three in five (60%) said they *had* noticed improvements with 33% saying they had not noticed and 8% not recalling.

Chart 14

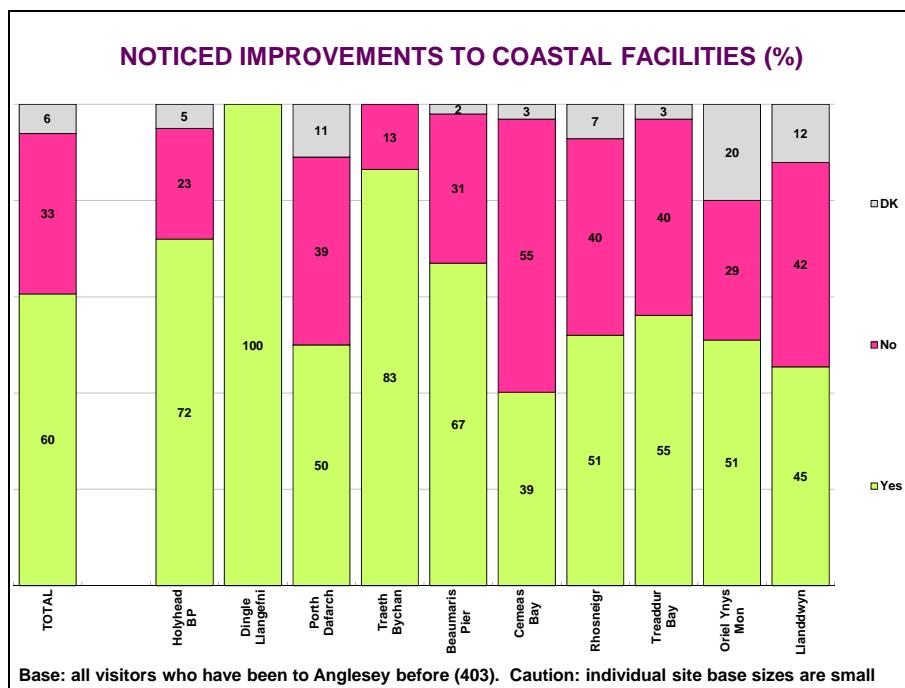


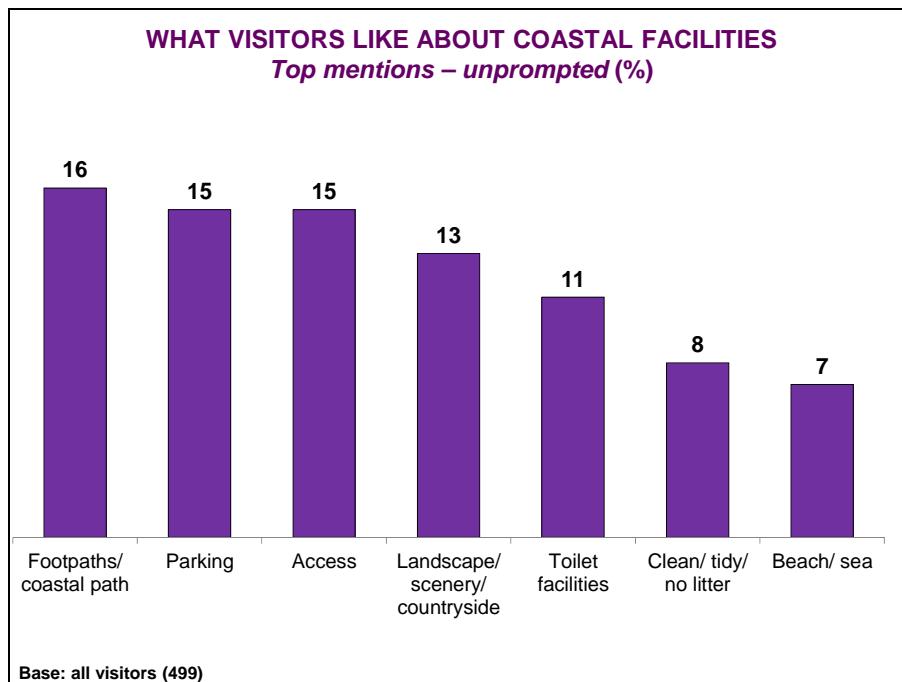
Chart 14, above, shows the overall results as well as breaking the results down by location of interviewing. Care needs to be taken when looking at the results by location of interviewing as individual base sizes are small. However there does appear to be some differences by location with all at Dingle Llangefni noticing an improvement (base: 12 respondents) compared to Cemaes Bay where over half (55%) have not noticed an improvement (base: 31).

Interestingly, 66% of those in a party including someone with a disability noticed improvements to facilities, compared to 58% who have no disabled people in their party.

4.4.2 What visitors particularly liked about coastal facilities

Visitors were asked what they liked about the coastal facilities in Anglesey, and what they thought worked well. The question was open-ended – with answers not prompted in any way. The results are shown Chart 15, below, demonstrating a wide range of aspects.

Chart 15



There was some difference in the answers by the lifestage of the visitor:

- **Young Independents** were more likely to mention the *beach/ sea*.
- **Older Independents** were more likely to mention *parking* and *access*
- **Empty Nesters** were more likely to mention *footpaths/ coastal paths*.

Looking at the results in more detail, **footpaths/ coastal paths** (16%) were the most spontaneously mentioned aspect that visitors enjoyed and thought worked well with comments focusing on the variety, quality and information available.

“Coastal paths [are] excellent. Able to walk around the whole island.”

“Good choice of walks, good information on walks.”

Parking was the next most-mentioned aspect that visitors liked about coastal facilities with 15% spontaneously mentioning it. Visitors particularly liked the amount of parking available, its situation (convenience) and also the fact that it was free:

“Accessible to car park, well thought out.”

“Plenty of car parking, well sign-posted.”

On a par with *parking* was **access** with 15% spontaneously mentioning this as something they particularly liked.

“Easy access to most facilities.”

“Everything has easy access.”

“All [coastal facilities] have been good and accessible.”

The **landscape/ scenery/ countryside** was spontaneously mentioned by 13% of visitors, with particular reference to the unspoilt nature of the environment and its quietness:

“[The coastal areas] are untouched and it’s not touristy. It’s like Cornwall fifty years ago.”

“Natural beauty and not commercialised.”

“Natural things, left as they are.”

Toilet facilities were mentioned spontaneously by over one in ten (11%) as a positive element of their trip, in particular the cleanliness of them, and the fact that there were plenty of them.

“Toilets are clean, especially Traeth Bychan.”

“Toilets – lovely building, nicely designed and blends in with the environment. And clean.”

“Public toilets have impressed me. Cleanliness especially.”

Visitors noticed the ***cleanliness and litter-free environment*** with nearly one in ten (8%) spontaneously mentioning this as an aspect they enjoyed:

“No debris or litter on beaches.”

“Litter free pathways.”

The ***beach and sea*** were spontaneously mentioned by 7% of visitors:

“Easy access to beach. Viewing areas get really good views of sea and beach.”

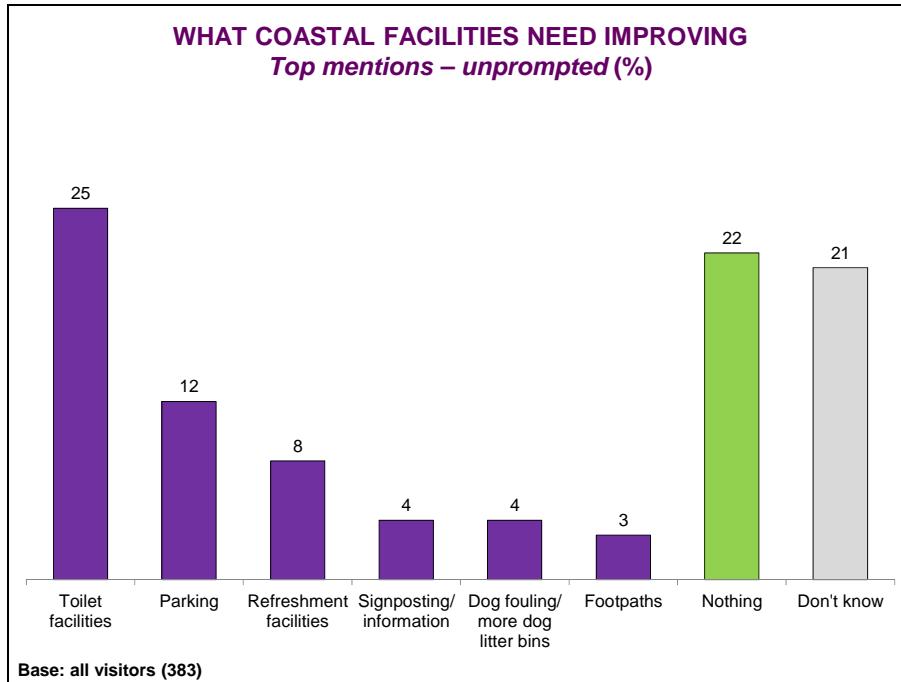
“Beaches are good for children.”

“Newry Beach Gardens are lovely generally. All improved country park.”

4.4.3 What coastal facilities need improving

For over a fifth of visitors (22%) *nothing* would improve coastal facilities, with a further fifth (21%) saying they did not know what would improve them (see chart below).

Chart 16



A quarter spontaneously mentioned **toilet facilities** as needing to be improved, with answers focusing on the need for better cleanliness and for them to be open out of season and later in the day (i.e. past 4pm).

“Disgusting portaloo toilets. Need to be cleaned.”

“Toilets at Cemaes Bay – they are terrible.”

“Toilets not open long enough.”

“Toilets very grim.”

“Closed toilets. Need to remain open throughout the year.”

Over one in ten (12%) spontaneously mentioned **parking** as an area that needs to be improved, specifically the cost of parking in some areas (in particular in towns) and the lack of available parking:

“Off-road parking is rather restricted at busy times.”

“Car parking prices need to be consistent.”

“Parking too limited and very expensive.”

Refreshments were mentioned by nearly one in ten as an aspect that could be improved:

“One or two more facilities like cafes.”

“Could we have a place/ vending unit to buy drinks.”

“Need better choice in food shops. Cash machines that don’t charge. Needs to be more choice of food in the middle bracket.”

4.5 Accommodation

Amongst those staying in Wales as part of their trip the most mentioned type of accommodation was *owned static caravans* with 30% mentioning this category.

Table 3: Type of accommodation used (top mentions)

	(%)
Owned static caravan	30%
Self-catering in house/ cottage	17%
Home of friend/ relation	11%
Mid to large hotel (11+ rooms)	6%
Towed caravan	6%
Campsite	5%
Self-catering apartment/ flat	3%
Rented/ static caravan	3%
Bed and breakfast	3%
Sample size	247

Base: all visitors staying overnight in Wales (397)

Looking by lifestage the accommodation choices show some variation:

- **Young Independents** are most likely to *stay with family and friends* (28% do so)
- **Older Independents** are most likely to stay in their *owned static caravan* (26%)
- **Families** are most likely to choose *self-catering cottage/ house* (22%)
- **Empty Nesters** are most likely to choose *owned static caravan* (33%)

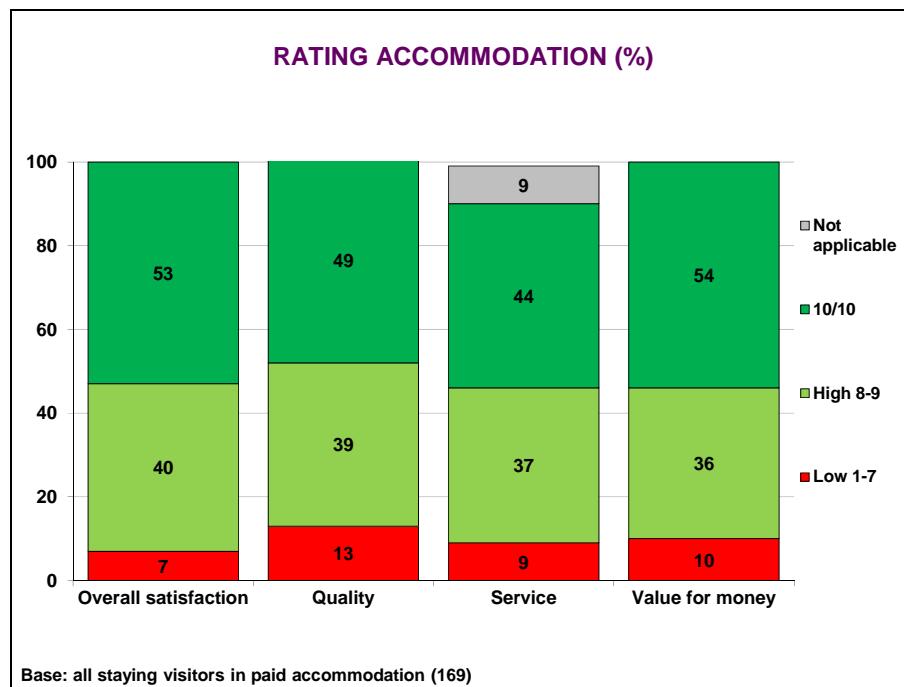
Amongst those who were staying in paid accommodation the most mentioned category was three to four stars with 38% in this segment. 16% were in 5+ star accommodation with 29% not aware of the grading.

Of those staying in Wales in paid accommodation nearly two thirds (83%) were staying within Anglesey itself: the top locations mentioned were Holyhead (14%), Beaumaris (12%) and Rhosneigr (9%).

Respondents were asked to rate their paid accommodation and the results are shown in the following chart.

Looking at *overall satisfaction* with accommodation the results are largely positive with approximately nine out of ten rating their accommodation 8/10 or above. For over half (53%) of visitors staying in paid accommodation the rating they gave was 10/10 for overall satisfaction.

Chart 17



For *quality*, *service* and *value for money* the ratings were similarly high with around half of all staying visitors rating the aspects 10/10.

Three in five (61%) of those staying in paid accommodation booked directly with the establishment (either by telephone, letter, email or on the establishment's website). A further 14% booked their accommodation on another website with the most-mentioned websites those dedicated specifically to accommodation.

APPENDIX – survey questionnaire

2012 ANGLESEY VISITOR SURVEY
(FINAL)

For office use:	Sample point ref:	(1)	(2)	Case number	(3)	(4)	(5)	(6)
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APPROACH ADULTS AGED 16 AND OVER

Good morning/afternoon. My name is..... from Beaufort Research, a member of the Market Research Society. We are conducting a survey among visitors here today on behalf of Anglesey Council. Could you spare me a few minutes to answer some questions about your visit? It won't take longer than about 10 minutes and everything you say will be kept confidential.

Q1	First of all, would you like to take part in this survey in English or Welsh?	(7)
	English	1
	Welsh	2
Q2	In which country is your main place of residence? Is it Wales, the rest of the UK, a country in Europe or beyond?	(8-9)
	In Wales (write in county)	x
	Somewhere else in the UK (write in county)	x
	Other European (write in country)	x
	Other international (write in country)	x
SHOWCARD A		
Q3	Which of these best describes the reason for your trip <u>here today</u> ?	(10)
	Part of a holiday, <u>staying</u> in Wales away from home	1 Staying visitor → Q5
	Part of a holiday to visit friends/ relatives, <u>staying</u> in Wales away from home	2
	A <u>day</u> visit to/ in Wales – for day trip/ outing or non-routine shopping	3 Day visitor → Q4
	A day visit to/in Wales – for routine appointment/ shopping	4
	On business	5 Thank and close
	For study	6
	Other	7
Q4	(DAY VISITORS TO WALES ONLY) Can I just check, will you be spending three hours or more away from home or your accommodation as part of your visit today – including travel?	(11)
	Yes	1 Q9
	No	2 Thank and close

(VISITORS STAYING IN WALES AWAY FROM HOME)

Q5	How many nights, in total, will you be staying <u>in Wales</u> away from home as part of your trip?	(12)	(13)	(14)
Q6	And how many nights have you stayed <u>in Wales</u> away from home so far?			

RECORD TOTAL NIGHTS STAYING AT Q5 ↓		Q6 NIGHTS STAYED IN WALES SO FAR ↓			
	(15)	Stayed no nights yet	Stayed 1 night so far	Stayed 2 nights so far	Stayed 3+ nights so far
Staying 1 NIGHT in Wales	1 →	x (→Q7)	1 (→Q7)		
Staying 2 NIGHTS in Wales	2 →	x (close)	1 (→Q7)	2 (→Q7)	
Staying 3 NIGHTS in Wales	3 →	x (close)	1 (→Q7)	2 (→Q7)	3 (→Q7)
Staying 4 + NIGHTS in Wales	4 →	x (close)	1 (close)	2 (→Q7)	3 (→Q7)
DK/ Refused	5 (→Q7)				

SHOWCARD B

Q7	What type of trip are you on?	(23)
	Main holiday of the year	1
	Secondary/ additional holiday	2
	A short break	3
	Other	4
	Don't know	5

**IF STAYING VISITOR FROM UK/ WALES ASK Q8
ALL OTHERS GO TO INSTRUCTIONS BEFORE Q9**

Q8	Does this holiday in Wales replace a holiday that would normally be taken abroad? SINGLE CODE	(24)
	Yes	1 } INSTR.
	No	2 } BEFORE
	Don't know	3 } Q9

**ALL OVERSEAS VISITORS - ASK Q9
ALL OTHERS GO TO INSTRUCTIONS BEFORE Q10a**

Q9	What was your <u>main</u> method of transport used to reach <u>Britain</u> ? SINGLE CODE	(25)
	Train (incl. Channel Tunnel)	1
	Ferry – car passenger (specify arrival port) _____	x
	Ferry – foot passenger (specify arrival port) _____	x
	Plane (specify arrival airport) _____	x
	Other (specify) _____	x

ASK ALL - CHECK ROUTING:

IF VISITOR FROM OVERSEAS OR UK – ASK Q10a and then Q10b

Q10a	OVERSEAS AND UK VISITORS What was your <u>main</u> method of transport used to reach <u>Anglesey</u> ? SINGLE CODE	(OVERSEAS & UK VISITORS)	(ALL ANSWER)	
Q10b	ALL ANSWER What method/s of transport have you used to get around Anglesey during your trip/ to get here today? MAY MULTICODE	(Q10a) Travel to Anglesey (26)	(Q10b) Travel around Anglesey (27-30m)	
	Private car/ van	1	1	Q12a
	Hired car/ van	2	2	
	Train	3	3	Q11
	Public bus/ coach	4	4	
	Private bus/ coach excursion/ tour	5	5	Q12a
	Bicycle	6	6	
	Motorcycle	7	7	Q12a
	Walk/ on foot	8	8	
	Taxi	9	9	Q12a
	Water taxi/ bus	A	A	
	Boat/ yacht	B	B	Q12a
	Campervan/ tourer	C	C	
	Plane (specify arrival airport) _____	x		
	Other (specify) _____	x	x	

ALL WHO USED TRAIN/ PUBLIC BUS/ PUBLIC COACH AROUND ANGLESEY

Q11

Overall how satisfied are you with the public transport you've used, taking into account availability and choice, service provided, value for money, and information availability? Please use a scale of 1 – 10 where 1 = very dissatisfied and 10 = very satisfied.

**Very
dissatisfied**

Very satisfied

1

2

3

4

5

6

7

8

9

10

(35)

Q12a	ASK ALL SHOWCARD C Which of the following, if any, are your reasons for visiting this part of Wales for this particular trip? MULTI CODE	Q12a ALL REASONS (36-39m)	Q12b MAIN REASON (40)
Q12b	And which one, if any, is your <u>main reason</u> for visiting this part of Wales. SINGLE CODE	1 2 3 4 Other (specify) _____ 5 6	1 → Q13a 2 → Q13b 3 → Q13c 4 → Q13d x 5 6
	To take part in outdoor activities (e.g. golf, fishing, horse riding, canoeing, paintballing etc) To attend an event/ concert/ show/ performance/ sporting match To enjoy the scenery, landscape, countryside, coast To visit places/ historical sites/ specific attractions Other (specify) _____ To visit friends and/or relatives Don't know		x } 5 Q14 } 6

FOR SINGLE MAIN REASON, AT Q12b ASK THE APPROPRIATE QUESTION, BELOW

Q13a

(MAIN REASON = TAKE PART IN OUTDOOR ACTIVITIES)

SHOWCARD D Which of the following, if any, have you/ will you take part in? **MULTICODE**

Adventure sports (rafting, canyoning, gorge walking)	1	Fishing – sea	A
Kayaking/ canoeing	2	Fishing – course/ game	B
Surfing/ wind surfing	3	Golf	C
Hangliding/ parachuting/ paragliding/ ballooning	4	Horse riding/ pony trekking	D
Mountaineering/ climbing/ abseiling/ caving/ potholing	5	Walking (<2 miles)	E
Sailing/ yachting	6	Walking (2+ miles)	F
Canal/ boating trips	7	Other	G
Cycling	8		
Mountain biking	9		

Q13b

(MAIN REASON = TO ATTEND AN EVENT/ CONCERT/ SHOW/ PERFORMANCE SPORTING MATCH)

SHOWCARD E Which of the following, if any, have you/ will you attend? **MULTICODE**

Rugby match (watch or play)	1	Theatre show/ performance	6
Football match (watch or play)	2	Arts/ cultural festival	7
Cricket match (watch or play)	3	Music festival	8
Music concert (classical)	4	Food fair	9
Music concert (rock/ pop)	5	Other	A

Q13c

(MAIN REASON = TO ENJOY SCENERY/ LANDSCAPE/ COUNTRYSIDE/ COAST)

SHOWCARD F Which of the following, if any, have you done or will you do? **MULTICODE**

Visit the beach	1	Touring/ sightseeing by car	4
Visit country parks/ forest parks	2	Walk the coastal path	5
Visit gardens	3	Other	6

Q13d

(MAIN REASON = TO VISIT PLACES/ HISTORICAL SITES/ SPECIFIC ATTRACTION)**SHOWCARD G** Which of the following, if any, have you/will you visit? **MULTICODE**

(53-56m)

Museum	1	Q14	Science/ technology centre	7
Art gallery or exhibition	2		Steam/ heritage railway	8
Castle/ stately house	3		Theme park	9
Workplace-based attraction (e.g. mill, factory)	4		Archive/ records office	A
Safari park/ zoo/ aquarium/ aviary/ farm	5		Town/ city centre	B
Historic monument/ archaeological site	6		Other	C

ASK ALL**SHOWCARD H**

Q14

Who are you with on this visit?

(60)

Alone	1
Spouse/ partner	2
Family only	3
Friends only	4
Family and friends	5
With club/ organised group	6
Other	7

SHOWCARD I

Q15

Do you or does anyone in your immediate party have any of the following conditions or impairments? You can read out the letter on this card.

MULTICODE. INCLUDES PROBLEMS WHICH ARE DUE TO OLD AGE

(61-64m)

A Mobility (e.g. wheelchair use)	1
B Sight (either partial sight or blind)	2
C Hearing	3
D Learning	4
E Long-term illness (e.g. cancer, arthritis)	5
Other	6
No conditions or impairments	7
Don't know	8
Refused	9

Q16

Is this your first visit to this part of Wales?

(65)

Yes	1	Q18
No	2	
Don't know/ can't remember	3	

SEE
INSTR.
BELOW

IF STAYING IN WALES GO TO Q17a**IF DAY VISITOR TO WALES GO TO Q17b**

Q17a

(STAYING VISITORS) Including this visit, how many times in the last three years have you been to this part of Wales for leisure or holiday purposes?

(66)

First visit in three years	1 → Q18
2 – 3 times	2
4 – 6 times	3
7 – 8 times	4
9 – 10 times	5
11 – 20 times	6
More than 20 times	7
Don't know/ can't remember	8

GO
TO
Q17c

Q17b	(70)	(DAY VISITORS TO WALES) Including this visit, how many times in the last year have you taken a day visit to this part of Wales for leisure or holiday purposes?	
		First visit in last year	1 → Q18
		2 – 3 times	2
		4 – 6 times	3
		7 – 8 times	4
		9 – 10 times	5
		11 – 20 times	6
		More than 20 times	7
		Don't know/ can't remember	8

Q17c	(71)	ASK ALL REPEAT VISITORS	
		Have you noticed any improvements to coastal facilities from your earlier visit/s? By coastal facilities I mean toilet and car parking facilities at coastal locations, the coastal path, viewing platforms and slipways into the sea.	
		Yes – have noticed improvements	1
		No - have not noticed improvements	2
		Don't know/ can't remember	3

Q18	(72)	ASK ALL SHOWCARD J	
		How likely would you be to make another visit within this part of Wales in the next few years?	
		Definitely will	1
		Probably will	2
		Probably won't	3
		Definitely won't	4

Q19	(73)	How likely would you be to recommend this part of Wales as a place to visit to your friends and/or family? Please use a scale of 0 – 10 where 0 = "extremely unlikely" and 10 = "extremely likely".									
		Extremely unlikely					Extremely likely				
		↓					↓				
		0	1	2	3	4	5	6	7	8	9
											10

Q20 Thinking of your visit to date, how satisfied are you with the following dimensions? Please use a scale of 1 – 10 where 1 = very dissatisfied and 10 = very satisfied.

READ OUT ↓	Very dissatisfied										Very satisfied	Not applicable
	1	2	3	4	5	6	7	8	9	10		
Anglesey overall as a place to visit											B	(80)
Overall value for money	1	2	3	4	5	6	7	8	9	10	B	(81)
Places to eat and drink	1	2	3	4	5	6	7	8	9	10	B	(82)
Attractions & places to visit	1	2	3	4	5	6	7	8	9	10	B	(83)
Visitor information during your trip	1	2	3	4	5	6	7	8	9	10	B	(84)
Standard of tourist signposting	1	2	3	4	5	6	7	8	9	10	B	(85)
Quality of the natural environment	1	2	3	4	5	6	7	8	9	10	B	(86)
Cleanliness of the general environment	1	2	3	4	5	6	7	8	9	10	B	(87)
Coastal facilities (e.g. slipways, seating, viewing areas, accessibility, parking)	1	2	3	4	5	6	7	8	9	10	B	(88)
Friendliness of people	1	2	3	4	5	6	7	8	9	10	B	(89)

Q21 So far in your trip, to what extent do you feel that your trip gives you a distinct Welsh experience that you couldn't have anywhere else? Would you say your trip gives you...

READ OUT

	A strong Welsh experience	(90)
	1	
	A slight Welsh experience	
	2	
	No distinct Welsh experience	
	3	
	Don't know	
	4	

SHOWCARD K

Q22 And how important, or not, is it to you that your trip to/in Wales gives you an experience that is distinct to Wales and that you couldn't have anywhere else?

	Very important	(91)
	1	
	Somewhat important	
	2	
	Not very important	
	3	
	Not at all important	
	4	
	Don't know	
	5	

DAY VISITORS TO WALES – SKIP TO Q27
STAYING VISITORS – GO TO Q23a BELOW

SHOWCARD L

Q23a During your stay in Wales, what type of accommodation are you using? If more than one type, please use the accommodation you stayed in last night.

Mid to large hotel (11+ rooms)	(100)
1	
2	
3	
4	
5	
6	
7	
8	
9	
A	
B	
C	
D	
E	
F	
G	
H	
I	

Q23b

Q24

Q23c

Q27

SHOWCARD M

Q23b What level of grading does your accommodation have?

1-2 stars	(101)
1	
2	
3	
4	
5	

Q24

Q23c **IF STAYING IN CARAVAN**

You mentioned you were staying in a static caravan, please can you tell me which of the following describes your accommodation? **READ OUT. CODE ALL THAT APPLY**

Owned by yourselves	(102m)
1	
2	
3	
4	

Q27

Q24

Q24 Thinking about where you stayed in Wales last night please could you tell me the name of the town where you stayed, or nearest to where you stayed?

(103-106)

Q25 Thinking about the accommodation you stayed in last night in Wales, how satisfied were you with the accommodation on the following dimensions. Please use a scale of 1 – 10 where 1 = very dissatisfied and 10 = very satisfied.

READ OUT 

**Very
dissatisfied**

Very satisfied

Quality	1	2	3	4	5	6	7	8	9	10	(107)
Service	1	2	3	4	5	6	7	8	9	10	(108)
Value for money	1	2	3	4	5	6	7	8	9	10	(109)
Overall satisfaction	1	2	3	4	5	6	7	8	9	10	(110)

Q26a	How did you <u>book</u> your accommodation in Wales? SINGLE CODE	(120)
	Directly with the establishment (by phone/ letter/ email/ establishment's website)	1 → Q27
	On another website	2 → Q26b
	With a travel agent/ tour operator	3
	Using a Tourist Information Centre	4 } Q27
	Other (specify) _____	x
Q26b	Don't know/ can't remember	6
	And what type of website did you use to book your accommodation? SINGLE CODE	(121)
	Accommodation specific website (specify) _____	1
	General tourism/ visitor website (specify) _____	2
	Other (specify) _____	3
	Don't know/ can't remember	4
Q27	ASK ALL	
	Thinking about <u>current coastal facilities</u> in Anglesey such as viewing areas, slipways, the coastal path, coastal toilets and car parks, what do you particularly like about them and what works well?	(122-125m)
	_____	1
Q28	Don't know	
	(FOR COASTAL LOCATIONS ONLY) PORTH DAFARCH, TREATH BYCHAN BEAUMARIS PIER, CEMEAS BAY, RHOSNEIGR, TREADDUR BAY, LLANDDWYN	
	And what coastal facilities in Anglesey do you think need improving? PROMPT What else?	(126-129m)
Q29	_____	
	Don't know	1

Q30a	Very Poor	Excellent
	Site overall	1 2 3 4 5 6 7 8 9 10
		(130)
Q30a	_____	(131-134m)
	Don't know	1

Q30b	(IF RATED 1-5) What improvements could be made to <u>this location</u> that, for you, would make it an excellent place to visit?	
	_____	(135-138m)
	Don't know	1
Q30b	_____	
	Don't know	

SHOWCARD N

I am now going to read out some statements that other people have said about holidays and life in general. For each statement that I read out, please tell me how much you agree or disagree with it.

		<i>Agree strongly</i>	<i>Agree slightly</i>	<i>Disagree slightly</i>	<i>Disagree strongly</i>	
Q31	I get a real sense of achievement and satisfaction planning and organising my own trips (putting together travel, accommodation and things to do)	1	2	3	4	(140)
	I enjoy discovering new experiences and places to visit within the United Kingdom	1	2	3	4	(141)
	I prefer to be independent and do my own thing when taking holidays and breaks	1	2	3	4	(142)
	I like to learn about the local way of life and culture of the places I visit	1	2	3	4	(143)
	I like to visit places that are still undiscovered by tourists	1	2	3	4	(144)
Q32	Do you or do any members of your party have access to the internet via a mobile phone or handheld device while on your trip in Wales?					(145)
		Yes	1 → Q33			
		No	2 → classification			
		Don't know	3 → classification			
Q33	IF HAVE INTERNET ACCESS VIA MOBILE/ HANDHELD DEVICE And have you accessed the internet via your mobile/ handheld device to find out things during this trip?					(146)
		Yes	1			
		No	2			
		Don't know	3			

CLASSIFICATION

Now just a few details to check that our sample is representative

GENDER

	(200)
Male	1
Female	2

STATUS IN HOUSEHOLD

* Chief Income Earner	(205)
	1
Other adult (aged 16+ or over)	2

AGE

	(201)
16-19	1
20-24	2
25-34	3
35-44	4
45-54	5
55-64	6
65 and over	7

WORKING STATUS OF RESPONDENT

	(206)
Working full time (30+ hours per week)	1
Working part time (up to 29 hours per week)	2
Full time education	3
Retired	4
Not working	5
Other	6

MARITAL STATUS

	(202)
Married or equivalent	1
Single, never married	2
Widowed/ divorced/ separated	3

OCCUPATION OF CHIEF INCOME**EARNER* (Last job if retired)**

Actual job: _____

Position/ grade: _____

CHILDREN (UNDER 16) IN HOUSEHOLD?

Yes	1
No	2

SOCIAL CLASS

AB	1	C2	3
C1	2	DE	4

(IF YES) Ages of children in h/hold.

	(204m)
0-4	1
5-10	2
11-15	3

Do you speak Welsh?

(208)

Yes, fluently 1

Yes, not fluently 2

Do not speak Welsh 3

*The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. Either male or female.

Respondent name: _____

Address: _____ County (Country if outside UK): _____

Postcode: (209) (210) (211) (212) (213) (214) (215) Telephone number: _____

THANK RESPONDENT: CLOSE INTERVIEW: PROVIDE THANK-YOU LEAFLET**INTERVIEWER DECLARATION:** I declare that I have conducted this interview in accordance with your instructions.

Signature: _____

	D	D	M	M	Y	Y	INTERVIEWER NO.				Accompanied:	Supervisor
Date of interview:	(216)	(217)	(218)	(219)	(220)	(221)	(222)	(223)	(224)	(225)	Yes 1 No 2	
<u>Month:</u> (226)		<u>Day of week:</u> (227)									<u>Weather (Mainly):</u> (228)	
August	1	Monday			1	2					Sunny 1	
October	2	Tuesday			2						Cloudy 2	
		Wednesday			3						Showers 3	
		Thursday			4						Rain 4	
		Friday			5						Windy 5	
		Saturday			6							
		Sunday			7							