



gwerth mewn gwahaniaeth
delivering on distinction

Meeting Title:	Tourism & Recreational Forum		
Meeting Objective:	The Morlais Tourism and Recreation Forum is a key part of Morlais and its partners' plans to ensure the sustainable tidal energy project delivers community benefits across the board.		
Location:	Microsoft Teams		
Date:	27/09/2022	Time	11:00
Attendees:	<p>Morlais: Dafydd Gruffydd (DG), Guto Wyn Hughes (GWH), Hannah Thomas (HT), Aimi Hopkins (AH), Gerallt Llewelyn Jones (GLJ), Claire Palmer (CP);</p> <p>Bangor University: Dr Edward Jones (EJ);</p> <p>British Mountaineers Council: Tom Carrick (TC), Tim Jepson (TJ);</p> <p>Anglesey Sea Kayak Alliance: Jenny Wong (JW);</p> <p>Canoe Wales: Alistair Pattullo (AP);</p> <p>Anglesey Sea Views: Tom Roberts (TR);</p> <p>Selkie: Ian Newton (IN);</p> <p>Ynys Cybi County Council: Efan Millner (EM);</p> <p>Stena Line: Alan Williams (AW).</p>		

Summary of Actions:

No.	Item No.	Action	Resp.
1	1	EJ to consider the implementation of membership data collected by kayaking groups into the monitoring process.	EJ
2	1	Morlais to consider the development of one data hub across all Working Groups relating to the MDZ project.	Morlais
3	2	GLJ to check if developers who have won a subsidy will be installing cabling prior to deployment in 2026 or within 2026.	GLJ
4	3	EJ to confirm with RibRide if they continue to use the South Stack area and, if so, how often.	EJ
5	4	EJ to check if the Welsh Government tourism barometer data is split between sub-sectors, such as adventure tourism.	EJ
6	4	Morlais to circulate a map of where footfall counters have been installed.	Morlais
7	4	The trends of the data collected by the counters to be considered in addition to the raw numbers.	EJ
8	4	EJ, EM & GWH to have a meeting to discuss the locations of information boards.	EJ, EM & GWH
9	4	All attendees to send suggested location for the information boards through to Morlais info@morlaisenergy.com .	All Attendees
10	5	DG to discuss with IoACC & WG regarding the financial support available for installing EV charging points at local business and report back to all attendees in the next meeting.	DG

11	7	EM will find out the timescale for the renovation of the toilets and share with DG.	EM
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Summary of Actions from previous meeting:

No.	Item No.	Action	Resp.	Completed by
1	3	Points to raise in the Ateb meeting – Need weekly updates on traffic management & need the diversion signs to be included on the map.	Morlais	Ongoing.
2	3	Share Bryn Williams contact details with Mathew Davies.	HT	Completed.
3	4	Confirm that the points addressed in the consultation by the RYA are being picked up and incorporated in the monitoring strategy.	Morlais	Completed.
4	4	Presentation displayed during the meeting to be shared with all attendees.	Morlais	Completed.
5	7	Morlais to ensure they get agreement from the boating clubs for the use of their data.	Morlais	Completed.
6	7	Invitation to be extended to Evan Millner for future meetings.	Morlais	Completed.
7	8	BMC & divers' representative to be invited to the meetings.	Morlais	Completed.

1.	Introductions
	<ul style="list-style-type: none"> • Agreement that minutes from the previous meeting are correct. • Introduction to all attendees. • DG went through the actions from the previous meeting. <ul style="list-style-type: none"> ○ Regarding Action 5 from previous meeting, JW stated that data has not been requested from kayaking clubs. There needs to be coordination in data gathering and one data collection hub across all Working Groups. ○ EJ to reflect on JW point and get back to the attendees. <p>ACTION: EJ to consider implementation of membership data collected by kayaking groups into the monitoring process.</p> <p>ACTION: Morlais to consider the development of one data hub across all Working Groups relating to the MDZ project.</p>

2.	Morlais Project Update
	<ul style="list-style-type: none"> • Onshore infrastructure work is making progress. • Jones Brothers, Morlais main contractor have employed local people on their apprentices scheme. • OBR, a local company, has won a contract from Jones Brothers. • Magallanes Renewables have won a CfD (contracts for difference) for 5.6MW.

- AP asked if the cabling for developers that will deploy in 2026 will be installed beforehand or at the same time?
 - GLJ – will revert back to AP on this.

ACTION: GLJ to check if developers who have won a subsidy will be installing cabling prior to deployment in 2026 or within 2026.

- TR asked what is the number of devices which can be deployed in the first phase during the monitoring?
 - GLJ – Developers won't be able to deploy more than 30MW.
- TR asked who decides where the developers get to deploy, and will they go in a less sensitive area of the MDZ?
 - GLJ noted that all service devices have to be in the south part of the zone. Ground conditions, speed of the tide etc will be factors of where the turbines will be deployed.
 - Morlais will have an influence in respect to major contributors to positioning using visual impact as the prime mover behind our contributor.

3. Update on data collected in last quarter (where available)

EJ displayed a presentation during this meeting.

- EJ asked the group if they think that the visitor numbers are back to what they were in 2019.
 - EM noted that the visitor numbers are up on Ynys Cybi.
 - TR noted that his business is as busy now as it was before covid. Road closures and diversions due to the MDZ project had minor effect on customers not attending/booking, with only two cancellations being made because of this work. However, road closures and diversions had an impact on visitors enjoyment during their stay.
- EJ asked if TR is seeing returning customers?
 - TR noted that they have regular guests which returned every year but also a percentage of new guests who might not return/ only visited the site once.
- JW stated that the average of the visitor attraction data has different contributors which might have different trends, and of the contributors only South Stack is the most relevant.
 - EJ noted that the average line is presented to identify an overall trend in visitor.. Attraction-specific trends (bar charts) were presented during the meetings.
- TR asked how often the RibRide use the South Stack area.
 - EJ didn't know their current usage but the company had previously been using Holyhead.

ACTION: EJ to confirm with RibRide if they continue to use the South Stack area and, if so, how often.

4. Discussion on analysis of collected data against baseline trends

- EJ asked the group if labour shortages is still an issue for the sector in the area.

- EM noted that recruitment is a big issue especially for the hospitality industry and there is a strategy being developed as part of the Shared Prosperity Fund proposal to help improve workers access into hospitality.
- There is a shortage of skills across the board, from catering to front of house.
- EJ asked if any business has raised concerns of energy costs.
 - TR stated that it is a major concern for all businesses, not only tourism and recreation.
- EJ presented results from the latest Welsh Government Barometer study. The study implies a strong seasonality pattern and EJ asked the group if the sector on Holy Island was busy all year round with tourism.
 - TR noted that he has busy all year round with his holiday cottages.
 - The demographics of visitors do change throughout the year; more families tend to stay in the summer and smaller groups/couples the winter.
- JW emphasised the need to be comparing like-with-like when considering seasonality patterns for the sector. Kayaking guides are operating all year round.

ACTION: EJ to check if the Welsh Government tourism barometer data is split up into between sub- sections, such as adventure tourism.

ACTION: Morlais to circulate a map of where both footfall counters have been installed.

- DG noted that the pattern of the counter data needs to be looked at rather than the numbers.

ACTION: The trends of the data collected by the counters to be considered in addition to the raw numbers.

- EJ displayed draft versions of the information boards on screen during this meeting.
- Exact locations of the Information boards need to be finalised.
- TR suggested that an information board should be installed at the car park in the rifle range.
- JW suggested that an information board should be installed at the country breakwater park.
- EM noted that Ynys Cybi Landscape Partnership are in the process of planning permission for notice boards in similar areas so there needs to be some coordination to avoid clutter, there also might be an opportunity to put something in the new visitor centre at the country breakwater park.

ACTION: EJ, EM & GWH to have a meeting to discuss the locations of the information boards.

- AP suggested putting information boards at launch points.
- TR noted that it would be useful to get the info boards in paper form that can be handed out to the public/tourists.
- Council wardens on slipways could hand out the leaflets to make people aware of the safety issues in the area.

ACTION: All attendees to send suggested location for the information boards through to Morlais info@morlaisenergy.com

5.	Discussion on current needs of the industry e.g. opportunities and challenges

- EJ asked if there was still demand for EV charging points and TR confirmed that there was.
 - The estimated cost for an overnight charging point is £1,700.
- DG noted that the Isle of Anglesey County Council and Menter Mon have been installing charging points in community centres across the island.

ACTION: DG to discuss with IoACC & WG regarding the financial support available for installing EV charging points at local business and report back to all attendees in the next meeting.

- JW noted that the Council have got funding for improving the toilet and changing room facilities at Porth Dafarch.
 - EM stated that the Council have got funding to make the toilets bigger and improve changing rooms facilities at Trearddur-Bay and Porth Dafarch.
 - EM is not sure of the timing but will take this way to Gwenllian head of the destinations team (IoACC).
- JW stated that toilets/ changing rooms for kayakers were needed at Soldiers Point.
- GLJ suggested a porta cabin which can be moved may help in providing facilities at various locations. However, CP noted that we need to think of who would be responsible for the maintenance of the porta cabin.

6. Discussion on any mitigations required, as identified by points 4 and 5

- Covered in previous agenda item.

7. AOB and date of next meeting

- AP –dig pits in the road for cabling should not, if possible, coincide with the Anglesey Sea Symposium The dates of the Symposium are Friday 28 April to Sunday 7 May 2023 inclusive (the 1st Bank holiday week in May).
 - This also needs to be considered for the works in the toilets/changing facilities.
 - EM will find out the timescale for the renovation of the toilets and share with DG.

ACTION: EM will find out the timescale for the renovation of the toilets and share with DG.