



gwerth mewn gwahaniaeth
delivering on distinction

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| 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: | 13/12/2022 | Time | 09:00 |
| Attendees: | | | |
| <p>Morlais: Claire Palmer(CP)(Chair), Guto Wyn Hughes (GWH), Aimi Hopkins (AH), Gerallt Llewelyn Jones (GLJ);</p> <p>Bangor University: Dr Edward Jones (EJ);</p> <p>British Mountaineers Council: 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:</p> <p>Ynys Cybi County Council: Efan Millner (EM); Wil Stewart (WS)</p> <p>Stena Line:</p> <p>Apologies : Phil Scott, William Calderbank, Angharad Crump.</p> | | | |

Summary of Actions:

| No. | Item No. | Action | Resp. | Due |
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| 1 | 1 | Wording in section 2 of the previous meeting minutes to be corrected to "surface" from "service" | AH | Completed 13/12/22 |
| 2 | 1 | Morlais to meet with TR to discuss additional footfall counters | GR | Completed 22/12/22 |
| 3 | 1 | Morlais to review and discuss the placement of information boards at Soldiers Point & the Rifle Range | Morlais | March 2023 |
| 4 | 1 | Morlais and stakeholders to be aware of the Anglesey Sea Kayak Symposium (organised for April 29 th to May 5 th). Information to be conveyed to the Morlais team. | CP | Feb 2023 |
| 5 | 3 | Meeting between EJ and JW to discuss how previously collected information on kayakers can be incorporated into the Marine Users Survey, to allow this information be collected into the future | EJ | Dec 2022 |

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| 6 | 5 | Share ideas on who will be responsible for the ongoing cleaning and upkeep of the toilet facilities | ALL | March 2023 |
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Ongoing Actions from previous meetings :

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| 1 | 1 | EJ to consider the implementation of membership data collected by kayaking groups into the monitoring process. | EJ | In Progress – data gathering ongoing |
| 7 | 4 | The trends of the data collected by the counters to be considered in addition to the raw numbers. | EJ | In Progress . loACC also provided data from their footfall counters from around the Island |
| 8 | 4 | EJ, EM & GWH to have a meeting to discuss the locations of information boards. | EJ, EM & GWH | In Progress - discussions ongoing with loACC. |
| 10 | 5 | DG to discuss with loACC & 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/GLJ | Application for funding has gone through the first stage. Stage 2 In progress, funding should be before the end of March |

Summary of Actions from previous meeting :

| No. | Item No. | Action | Resp. | Update |
|-----|----------|--|---------|--|
| 1 | 1 | EJ to consider the implementation of membership data collected by kayaking groups into the monitoring process. | EJ | In Progress – data gathering ongoing |
| 2 | 1 | Morlais to consider the development of one data hub across all Working Groups relating to the MDZ project. | Morlais | Completed – Tabs are already on the Morlais website. |

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| 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 | Completed - Magallanes would like to start marine works 18 - 24 months before installation (best estimate summer 2025). |
| 4 | 3 | EJ to confirm with RibRide if they continue to use the South Stack area and, if so, how often. | EJ | Completed - Regular trips from Holyhead are temporarily halted due to issues with fuel storage at Holyhead Marina- may begin to use again in the future |
| 5 | 4 | EJ to check if the Welsh Government tourism barometer data is split between sub-sectors, such as adventure tourism. | EJ | Completed – data isn't split. |
| 6 | 4 | Morlais to circulate a map of where footfall counters have been installed. | GWH/HT | Completed – Map circulated 10/11/2022. |
| 7 | 4 | The trends of the data collected by the counters to be considered in addition to the raw numbers. | EJ | In Progress . IoACC also provided data from their footfall counters from around the Island – this will be incorporated into the analysis. |
| 8 | 4 | EJ, EM & GWH to have a meeting to discuss the locations of information boards. | EJ, EM & GWH | In Progress – discussions ongoing with IoACC. |
| 9 | 4 | All attendees to send suggested location for the information boards through to Morlais info@morlaisenergy.com . | All Attendees | Complete – suggestions Soldiers Point & Rifle Range Car Park |
| 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/GLJ | Application for funding has gone through the first stage. Stage 2 In progress, funding should |

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| | | | | be before the end of March |
| 11 | 7 | EM will find out the timescale for the renovation of the toilets and share with DG. | EM | Completed – dates circulated to all attendees. |

Summary of Actions from previous meetings :

| No. | Item No. | Action | Resp. | Completed by |
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| 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 | Completed |
| 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. |

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| 1. | Introductions & Actions from previous meetings |
| | <ul style="list-style-type: none"> • Introduction to all attendees. • CP asks for comments and matters arising from previous meeting minutes. <ul style="list-style-type: none"> ○ AP comments on a typo in the previous minutes in section 2 - GLJ noted that all service devices have to be in the south part of the zone – This should say “surface” not “service” <p style="text-align: center;">ACTION – Previous meeting minutes to be corrected as above</p> ○ AP comments that the positioning of devices is not only about visual impact but maybe the prime mover should be the safety of other marine users rather than just the visual impact. ○ CP thanks AP for his comments and adds that there is also a separate group meeting held to discuss Navigational Risk. |

ACTION – GR to meet with TR to discuss locations for additional footfall counters

- On action point 9.4 TR suggests The Rifle Range Car Park as a site for one information board.
- AP confirms he sent an email on 27/09/2022 to the Morlais team in regard to action point 9.4 with the suggestion of Soldiers Point.

ACTION - Discuss the placement of an information boards at Soldiers Point & the Rifle Range

- GLJ reports on action point 3.2 regarding the developers cabling. More detailed information will be fed back to the group as we get it.
 - AP asks if there will be vessels in Abrahams Bosom whilst pulling the liner into the duct.
 - GLJ confirms the decision will take place towards the end of Feb 2023. It is possible that vessels will be deployed, but they will be in the Abrahams Bosom area, very close to shore. It is not possible to be exact until after Feb and this will also be weather dependant.
 - AP asks if Morlais can avoid this work between April 29th and May 5th due to the Anglesey Sea Kayak Symposium **being held during those days**.

ACTION – Morlais and stakeholders to be aware of the Anglesey Sea Kayak Symposium (organised for April 29th to May 5th). Information to be conveyed to the Morlais team.

- GLJ provided an update on the funding applied for in action point 10.5
- EM confirms for action point 11.7 that the work has started on the toilet blocks in Porth Dafarch and Treaddur Bay and should be completed by the end of March 2023.
- CP thanked Jenny Wong, in her absence, for her toilet facility site suggestions made in the last meeting.
- TJ leaves a comment on the chat regarding action point 10.5 - **I asked our last BMC area meeting if there were any infrastructure projects they would like to see implemented as a side-benefit of the Morlais initiative. The only suggestion was 'improved public transport and parking serving the prime climbing areas'. In general climbers tend to be very self-contained once they have arrived at their intended venue.**

2. Morlais Project Update (GLJ)

- A brief update is given on the project and the up-and-coming traffic works.
- Morlais is 50% through the capital works now.
- Final stages of the ducting work are being undertaken at the bottom of South Stack Hill.
- JB reported that the only 2 lane road closures will be Porth Dafarch Road during Jan & Feb 2023.
- Substation Holyhead is growing.
- Morlais continues to support local benefits and local employment, e.g. the number of apprenticeships created by Jones Brothers due to their work with Morlais.
- Magallanes have been successful in obtaining a CFD to deploy in 2026 for 5.62MW (3 or 4 devices).
- Morlais are hoping for a further 24MW to compete for a CFD subsidy early next year.

- Morlais will be submitting a business case for NWGD funding early next year to extend the infrastructure work from Parc Cybi to the old Anglesey Aluminium site in order to connect up to the National Grid.
- AP asked about the maximum MW prior to connecting to the National Grid.
- GLJ said Morlais have 18MW contracted at Parc Cybi through SPEN. If a developer is successful at CFD in 2023, they will not deploy until 2027 by which time Morlais will have completed the work of connecting up to NG.

No further questions for GLJ

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

- ***EJ shared a presentation on screen to show updates on data collected***
- Due to a significant proportion of the data being analysed is only updated on an annual basis, EJ reported that there is not much more to update since the last meeting in September.
- EJ, therefore, focused on presenting results from the Marine User Survey, which collects data throughout the year on an ongoing basis.
- EJ points out the comment from the previous meeting regarding incorporating the Kayakers questionnaire into the Morlais Marine Users Survey.

ACTION- Have a meeting with JW to see how we can incorporate the canoeists data from the Kayakers questionnaire

- All the data and surveys completed are shared and discussed with attendees.
- While there is now 2 years of marine users survey data collected, it was agreed that 3 years of data is needed before any robust conclusions can be made.

Jenny Wong joins the meeting at 09.30

- It was noted that it is good to see that Anglesey is attracting new people to the area.
- EJ draws the attendee's attention to the graph showing visitor numbers during the year with a higher number visiting in July and August, which implies a summer-peak for the tourism season. This would be consistent with the trend seen across Wales but not consistent with the feedback received through Morlais Business Survey.
- TR reports that their cottages are busy throughout the year, but this year bookings have decreased slightly over the winter, this was expected due to the current economic situation. The caravans are more of a seasonal demand (April – Oct) and drop off during the winter.
- EJ asks the attendees if the bridge closure has impacted their businesses.
- TR reports that this does not seem to have had an impact on their business whatsoever.
- EJ asks IoACC for their views on Anglesey as a tourist destination. Are we still busy throughout the year? EM reports that from the perspective of IoACC and the messages he is getting back is that the shorter seasons are disappearing, and it is remaining busy though out the year but there is a rise in activities thorough the year and not just over the summer.
- WS says that the tourism industry on Anglesey is continuing thorough the year. Anglesey's main catchment area from England for many years was Manchester and the Northwest but there seems to be a tourism spike from visitors from the South and Northeast of England.
- WS says he has not yet had any reports from tourists about issues or difficulty coming over the bridge.

- JW says visitor numbers only drop off in the winter because of the weather.
- TJ agrees that the spike in visitor numbers is related to the weather and the fact that weather forecasts are more accurate and available.

4. Discussion on analysis of collected data against baseline trends

- **As discussed above**
- EJ asks attendees if tourists have mentioned the proposed Tourism Tax.
- TJ says there has been some mention and discussions are continuing in many grey areas at the moment.
- JW confirms that they are a local group, so this has not come up at present.
- EJ asks if anyone thinks the tax would but any visitors from abroad off.
- TJ confirms that tax is paid abroad by members of the BMC. The reaction is positive when the tax it is going into local infrastructure. There are pros and cons.
- WS reports that there have been comments about the parking charges and how the Tourism Tax if brought in would be used and benefited. People will need to see where the Tourism Tax will be going and what it will be used for.
- AP comments about the Marine Survey slide 1 in section 3. regarding the surveys in November, suggesting there would not be many kayakers in November.
- EJ confirms this is data collected in 2021 & 2022 up until November.

No further questions

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

- CP reports on the application in at the moment for the EV chargers. We have been invited for second stage application for funding and will keep a dialog open.
- JW reports on the conversation initiated with Paul Hansen who has responsibility for the Stakeholder engagement from Marico on the marine traffic survey they need to do. They are in early stages of discussing with them on how they can use, collect and feed in log book based data into it to try and calibrate different surveys.
- EJ would like to comment on the discussions from the last meeting about toilet facilities and all agreed this is still needed for the industry.
- CP reports that the timescale for the financial allocation that the toilets fall within is the end of March 2023. We are hoping to get the allocation by that time and work together to look at some rapid implementation solutions. We will need to discuss who will be responsible for the cleaning and maintenance of the toilet facilities moving forwards.
- JW suggests a wider conversation and collective discussion about the whole thing.
- CP suggests more detailed discussions about the practicality in the New Year.
- EJ comments on the increased visitor demands for EV charging points as mentioned by TR.
- CP suggests we need a better understanding of where this need is geographically.

No further comments or questions

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| 6. | Discussion on any mitigations required, as identified by points 4 and 5 |
| | <ul style="list-style-type: none">• As discussed above• All attendees are asked for their thoughts and comments <p>No further comments or questions</p> |

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| 7. | AOB and date of next meeting |
| | <ul style="list-style-type: none">• Date of next meeting March 2023 – date to be confirmed with attendees |