



gwerth mewn gwahaniaeth  
delivering on distinction

<b>Meeting Title:</b>	Tourism & Recreational Forum		
<b>Meeting Objective:</b>	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.		
<b>Location:</b>	Microsoft Teams		
<b>Date:</b>	14/03/2023	<b>Time</b>	15:00
<b>Attendees:</b>			
<p><b>Morlais:</b> Claire Palmer (CP)(Chair), Guto Wyn Hughes (GWH), Hannah Thomas (HT) Gerallt Llewelyn Jones (GLJ);</p> <p><b>Bangor University:</b> Dr Edward Jones (EJ);</p> <p><b>Anglesey Sea Kayak Alliance:</b> Jenny Wong (JW);</p> <p><b>Canoe Wales:</b> Alistair Pattullo (AP);</p> <p><b>Selkie:</b> Ian Newton (IN);</p> <p><b>Isle of Anglesey County Council:</b> Efan Millner (EM), Wil Stewart (WS), Andy Godber (AG);</p> <p><b>RSPB:</b> Laura Kudelska (LK);</p> <p><b>Apologies :</b> Angharad Crump, Tom Roberts.</p>			

#### Summary of Actions:

No.	Item No.	Action	Resp.	Due
1	1	Wording in section 9.4 of the previous meeting minutes to be corrected to add " <b>additional</b> " before locations and correct typo " <b>But</b> " instead of " <b>Put</b> "	AH	Completed.
2	3	Send invites to businesses put forward by Will Stewart.	Morlais	By next meeting
3	3	Ed Jones to hold direct engagement with Will Stewart.	EJ / WS	By next meeting
4	3	Ed Jones to hold direct engagement with Laura Kudelska.	EJ / LK	By next meeting
5	6	Morlais to continue to communicate road closure notices across a wide range of channels. Morlais to be aware of the Sea Symposium at the end of April / beginning of May.	Morlais	Ongoing
6	6	Morlais to continue to communicate remedial works to ensure sympathetic landscaping of the landfall substation site.	Morlais	Ongoing
7	7	Ed Jones, Guto Wyn Hughes and Jenny Wong to meet and discuss her survey.	EJ / JW	By next meeting

8	7	Andy Godber to discuss with Ed Jones regarding further Bangor university involvement in data analysis.	EJ / AG	By next meeting
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#### Actions from previous meeting:

No.	Item No.	Action	Resp.	Due
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	Meet with TR to discuss additional footfall counters	GR	Meeting arranged for 22/12/22
3	1	Discuss the placement of an information boards at Soldiers Point & the Rifle Range	Morlais	March 2023
4	1	Feed back to the team on the Anglesey Sea Kayak Symposium – April 29 <sup>th</sup> – May 5 <sup>th</sup>	CP	Feb 2023
5	3	Have a meeting with JW to see how we can incorporate the canoeists data from the Kayakers questionnaire	EJ	Dec 2022
6	4	Discuss thoughts on the proposed Tourism Tax with her members	JW	March 2023
7	5	Share ideas on who will be responsible for the ongoing cleaning and upkeep of the toilet facilities	ALL	March 2023
8	5	Check for accurate numbers and locations for EV charging points	CP / EJ	March 2023

<b>1.</b>	<b>Introductions &amp; Actions from previous meetings</b>
	<ul style="list-style-type: none"> <li>• Introduction to all attendees.</li> <li>• CP asks for <b>comments and matters arising from previous meeting minutes.</b> <ul style="list-style-type: none"> <li>○ AP comments that on the previous actions in section 9.4 – This should say “additional suggestions” instead of “suggestions” as some locations had already been discussed.</li> <li>○ AP points out a typo in section 4 of the previous meeting minutes – Should say “put” instead of “but”.</li> </ul> </li> </ul> <p style="text-align: center;"><b>ACTION – Previous meeting minutes to be corrected as above</b></p>

<b>2.</b>	<b>Morlais Project Update (GLJ)</b>
	<ul style="list-style-type: none"> <li>• Building structures have been erected and the roofing and cladding of these will begin shortly.</li> </ul>

- Cable installation is 50% complete and this work will continue until May 2023.
- The reinstating of dry-stone walls and fields is progressing well.
- The aim is to re-open Porth Dafarch Road for part of the Easter holidays.
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- JW noted that it was stated in a previous meeting that a decision would've been made on deploying a vessel in Abrahams Bosom to line the HDD duct by February 2023. AP asked if any decision has been made and when Morlais will be deploying a vessel?
- GLJ responds that no decision has been made and a decision on lining the HDD is not likely for the foreseeable future.
- There are plans to undertake two additional short drills in the summer.
- The week commencing 29<sup>th</sup> April has been flagged with contractors to minimise disruption for the sea symposium. Notices for any marine works in that area will be communicated in advance.
- Additional device developers will be bidding into AR5 with announcements in September 2023 – it is anticipated that another developer be granted funding to deploy in the MDZ.
- Currently Magallanes hold 5.6MW of capacity – This could stay the same or be increase to as much as 25MW.
- GLJ reiterates that the first devices won't be deployed until summer of 2026. Deployment will be a phased approach to ensure that the project incurs no harm to the surrounding environment and sea life/ wildlife

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

- EJ states that data collection is progressing ahead as planned.
- In previous years EJ has engaged with local businesses to assess the impact of the Morlais development. This was done through the business survey, which provides an understanding how businesses are performing across a variety of sectors to provide context for data collection.
  - EJ expresses that this has been successful in previous years with lots of engagement and feedback on the Morlais project.
  - However, this year the response from business has been weak, with only one engagement to date despite a large number of businesses being invited to participate.
  - EJ asks for input on how Morlais can increase engagement with local businesses.
  - WS values tourism and recreation meetings. Also states people he's engaged with are genuinely interested in the Morlais project.
  - WS suggests additional two businesses to be invited to the next meetings.

**ACTION- Send invites to businesses put forward by Will Stewart.**

- CP asks the rest of the attendees to send forward suggestions for additional stakeholders Morlais can engage with in this forum.

**ACTION- Ed Jones to hold direct engagement with Will Stewart.**

- EJ asks if RSPB would still like to be involved with this engagement and who the best contact for this is.

**ACTION- Ed Jones to hold direct engagement with Laura Kudelska.**

- EJ shares figures for average daily steps from the footfall counters located at RSPB South Stack for 2022 (months April 2022 – December 2022).
  - EJ highlights volatility in the data with very quiet days (near zero) with other days showing greater than 400. The data is analysed on a daily average basis to ensure trends can be identified.
  - EJ asks if the trends presented by the data seem reasonable and as expected given others experience.
  - AP states the data looks sensible to him, based on commercial information he holds regarding a business locally in the tourism sector.
  - LK suggests that EJ compares the data from the footfall counters to visitor numbers recorded at the RSPB South Stack visitor centre. But LK also states that at first glance the figures look similar.
  - CP asks if any comparisons have been held between the figures and weather data.
  - AG states the trends appear reasonable give that seen for the North Wales coastal path.
- EJ also asks for input on the typical tourism season peak and trough – whether this is still as prevalent as it used to be and if the typical off-season is reflected in the footfall counter data. The trends observed implies a peak-and-trough in tourism season but previous analysis of local businesses (through the business survey)) implies there is no longer a peak-and-trough in the sector.
  - LK said there is a definite trough in tourism during the winter months due to the closure of many caravan sites.
  - WS recalls from his own experience that tourism used to be exclusive to the summer school holiday period – stating that now people are actively on holiday all year round (retired couples walking in Autumn time and Families going away for Christmas as examples) and from further afield (beyond just North West England).
  - CP adds that remote working has allowed people to go away and continue to work.
  - WS mentions that parking charges and tourism tax are not resented by all and that awareness of the necessity of these charges and where the funds go is essential to ensure willing compliance.

#### 4. Discussion on analysis of collected data against baseline trends

- **As discussed above**
- EJ states that he hasn't seen a great shift from the baseline data.
  - EJ believes that the tourism sector locally received some boost from the pandemic by forcing people to holiday within the UK.
  - EJ adds that he's been told that some local tourism businesses are investing in their offering, furthermore demonstrating that people are still visiting the area in high numbers.

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

- CP asks all attendees if there is anything they would like to highlight here.

<b>6.</b>	<b>Discussion on any mitigations required, as identified by points 4 and 5</b>
	<ul style="list-style-type: none"> <li>• CP asks all attendees are asked for their thoughts and comments.</li> <li>• EJ highlights that all road closures are clearly advertised well in advance and the importance of ensuring no closures or disruption during the Easter period.</li> <li>• EJ adds that in his experience the Easter period is incredibly important for business in the local tourism sector, particularly at a time when margins are tight due to rising costs.</li> </ul>
	<p><b>ACTION- Morlais to continue to communicate road closure notices across a wide range of channels. Morlais to be aware of the Sea Symposium at the end of April / beginning of May.</b></p>
	<ul style="list-style-type: none"> <li>• CP states she always impressed as to how quickly the notices spread throughout outdoor online communities.</li> <li>• CP adds that the website is also due an overhaul – improvements to immediate messaging systems. Existing notice board to stay in place and up-to-date throughout this development period.</li> <li>• WS highlights a hope from a local resident regarding the landscaping surrounding the landfall substation site and that it will be done aptly. He suggests that Morlais should reassure residents on this point.</li> <li>• CP states that a more agile website will allow Morlais to post more frequent updates with images to show the remedial works that are being undertaken.</li> </ul>
	<p><b>ACTION- Morlais to continue to communicate remedial works to ensure sympathetic landscaping of the landfall substation site.</b></p>
	<ul style="list-style-type: none"> <li>• AP mentions that the points they were going to raise around surrounding the roads have been addressed here.</li> </ul>

<b>7.</b>	<b>AOB and date of next meeting</b>
	<ul style="list-style-type: none"> <li>• CP highlights JW had requested to share some information with this group regarding some independent data collection that Anglesey Sea Kayakers Alliance are conducting.</li> <li>• AP adds that this data collection is in conjunction with Canoe Wales.</li> <li>• CP invites JW to share this with the group.</li> <li>• JW states that discussions with EJ have been ongoing. <ul style="list-style-type: none"> <li>○ JW had conducted an online survey and produced a report for the public enquiry.</li> <li>○ JW felt that this, as a planned routine survey, needed to be different the one-off survey designed specifically for purpose of informing the enquiry.</li> </ul> </li> <li>• JW shares details of surveys and states that this research follows a similar format to that of the Morlais survey but is essentially a shortened version.</li> <li>• Questions split between simpler tourism and recreation questions and those that are more relevant to the navigational aspects e.g. were you in a tide race etc.</li> <li>• JW highlights that this took place during February with the aim of overlapping with the Morlais winter marine traffic survey.</li> <li>• JW unsure if this lot of data will still be useful given that the Morlais survey hasn't taken place when she expected it to.</li> </ul>

- JW highlights that the majority of activity occurs at the weekends, with some occurring mid-week so long as the weather is permitting.
- JW also shares data on the use of launch sites, stating that 38% of participants in the survey launched at the stacks.
- JW finally shares data on the residences of survey participants of which 46% were from Anglesey, 25% from elsewhere in north Wales and 29% from England – highlighting the majority are coming from Cheshire.
- JW summarises that this is a first look at their data, but it shows that there is still water-based activity occurring in the winter months.
- CP thanks JW for the interesting additional data.
- EJ states he struggled to comment due to connection issues (most of the presentation were not show), but thanks JW for the additional useful data. He suggests a meeting between himself and JW at a later date to discuss.

**ACTION- EJ and JW to meet and discuss JW survey.**

- AG mentions a contact at Bangor University who are interested in data analysis and suggests they could be valuable to get involved in this.

**ACTION- AG to discuss with EJ regarding further Bangor university involvement in data analysis.**

- CP highlights that there is avenues to engage with the Morlais team outside of this meeting, suggesting the [info@morlaisenergy.com](mailto:info@morlaisenergy.com) email as a first point of contact.
- JW mentions that some level of consent has been given to the Conygar In Holyhead harbour which will have some level of impact on tourism. She asked if the Morlais team have had any thoughts on how to differentiate impacts on tourism between that project and theirs.
- CP states that she is unaware of that project but the Morlais team will be aware and will take into consideration it moving forward.
- Date of next meeting June 2023 – date to be confirmed with attendees.