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Supplementary Tourism and Recreation Assessment

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BANGOR UNIVERSITY

SUPPLEMENTARY TOURISM AND RECREATION ASSESSMENT

FINAL REPORT

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1. INTRODUCTION

This report sets out the information required to support the Morlais energy development application located off Holy Island and builds upon the assessment upon tourism within Chapter 25 of the Environmental Statement (ES). The overall aim of the report is to provide supplementary information to that within the ES to further inform the impact assessment upon tourism and recreation. This will be through:

- provide economic analysis and the results of questionnaires to recognise the importance and activities of tourism and recreation activities on Holy Island,
- present case studies of the likely impact the Morlais development could have on the local tourism and recreation sector,
- outline an approach to establish a baseline of activities and identify key performance indicators of the tourism and recreation activities,
- describe key Isle of Anglesey County Council policies relating to the sector,
- present actions to mitigate any negative effects Morlais could have on visitors experience and activities, and
- give an approach to monitor the performance of tourism and recreation activities on Holy Island.

2. BACKGROUND

The following is taken from Morlais Project Environmental Statement Chapter 25: Socio-Economics, Tourism and Recreation (August 2019).

Given that tidal energy development at the scale proposed by the Project is relatively new and that the underpinning economic basis for the sector is continually under review, there are no references that can be used to provide a definitive prediction of possible socio-economic outcomes for the Project. This differs significantly from, for example, a similar socio-economic assessment of a commercial-scale offshore wind farm where there is now a 20-year track record of costs and benefits.

Anglesey is highly dependent on the tourism and recreation sectors and attracts 1.71 million visitors per annum, contributing £304M per annum to the local economy. The latest Isle of Anglesey County Council Tourism Topic Report (Isle of Anglesey County Council, November 2018) showed that the Tourism Sector employs approximately 20% of the island's population. Tourism forms the bedrock of the island's economy and the industry has been and continues to be, supported by initiatives and funding programs to promote the island's cultural, recreational and environmental assets.

The growth in the Tourism Sector in Anglesey, far outstrips that of the rest of Wales with a 64% increase in revenue between 2006 and 2017, representing growth of 7% (4% higher than the national average). Although Anglesey predominately attracts tourists from the North West of England, Holyhead has also become a destination of choice for cruise ship operators. 2018 saw 43 cruise ships visit with approximately 32,700 passengers potentially disembarking. With an average spend of between £80 and £100 per head, passengers contribute significantly to the Island's economy (Isle of Anglesey County Council, November 2018).

Tourists are attracted to Anglesey for many reasons. A 2003 Survey carried out by Anglesey and Gwynedd Councils as part of the Local Joint Development Plan stated that 41% of visitors were attracted to the region by the scenery and landscape, 19% by the beaches and coastlines and 18% by access to outdoor activities. Other factors included tranquillity, walking, castles and abbeys. Unequivocally, the area's landscape and natural beauty play a significant role in the number of visitors Anglesey receives, as does its rich and diverse cultural heritage. Whilst the cable landfall will be onto one of Anglesey's beaches, at Abrahams Bosom, this is not a busy or popular amenity beach, so effects on tourism are likely to be negligible.

The landscape and visual impacts of the Project are assessed separately within [Morlais Project Environmental Statement] Chapter 24, Seascape, Landscape and Visual Impact Assessment. This has taken into account embedded mitigation introduced during the project design process to minimise visual impacts of the Project from the coastline. Eight indicative subzones within the MDZ are shown, however, these indicative zones may be modified to meet the requirements of tenants and regulators. Within subzones 1 – 3 and northern parts of subzones 4 and 8 (which overlay the yellow and purple shaded areas), no visually prominent devices would be deployed. This mitigation will further reduce any possible negative effects on tourism and recreation arising as a result of the visibility of the Project from the Wales Coastal Path and South Stack RSPB Reserve.

The north west of Holy Island has a range of visitor accommodation including self-catering, bed and breakfast and caravanning and camping accommodation. This includes South Stack Coastal Retreats (a range of self-catering cottages), Ty Mawr Farm Camping and Caravan Club site caravan site and Blackthorn Farm Caravan site. These could all be subject to temporary disruption during construction of onshore infrastructure, including road closures, diversions and highways works, particularly along the South Stack access road. However, these closures will be very temporary in nature and so not likely to result in significant disruption to access.

Anglesey provides a microcosm of all the recreational activities available in North Wales. Anglesey is home to 125 miles of coastal paths that circumnavigate the island. Menter Môn invested £6M to improve coastal access around Anglesey, as part of the wider Wales Coast Path project. These footpaths travel through areas of both cultural significance and Areas of Outstanding Natural Beauty (AONB).

The Wales Coast Path closely follows the coastline along the north west of Holy Island. The section around the South Stack area is extremely popular, and part of an important RSPB reserve for active visitor engagement attracting circa 180,000 visitors per year.¹ Potential exists for temporary closures to Public Rights of Way (PRoW), including the Wales Coast Path, during the construction phase of the Project.

Embedded mitigation has been introduced during the project design process to minimise visual impacts of the Project from the coastline including coastal footpaths. Within subzones 1 – 3 and northern parts of indicative subzones 4 and 8 (which overlay the yellow and purple shaded areas, no

¹ RSPB 2010 figure from: http://ww2.rspb.org.uk/Images/PEASouthStackJan11_tcm9-268711.pdf

visually prominent devices would be deployed. This will further reduce the visibility of the Project from the Wales Coastal Path.

Further mitigation in the form of the provision of appropriate signage will also be implemented to ensure all path users (locals and tourists) are notified of any minor diversions and/or temporary restrictions around the construction period. There will also be consultation with local people and organisations about appropriate signage and interpretation boards when the site is commissioned.

Anglesey has an extensive rural cycle path network, and two National Cycle Routes including National Route 8 (Lôn Las Cymru) which runs from Cardiff to Holyhead. Menter Môn has invested heavily in creating cycling infrastructure on the island, supporting the creation of five new cycleways on Anglesey. This investment and the variety Anglesey offers the cyclist means that it appeals to both novice and expert cyclists alike. The island also hosts an annual “Tour De Mon” road biking event, where competitors ride over a 42- or 107-mile course. This event alone attracts over 1,000 competitors to Anglesey each year.

Anglesey is also improving its existing mountain biking infrastructure and has two dedicated mountain biking trails, the Bike Quest Nature Challenge Trail and the Corsica Bike trail, both located in Anglesey’s Newborough Forest. The beauty of the national environment and the relative quietness of the island’s roads compared to other areas of the UK, make Anglesey a popular destination for cyclists.

Anglesey offers a wide range of coastal and offshore recreational activities. Coasteering - the practice of individuals navigating around rocky headlands and jumping into the sea - is a popular and exhilarating activity. Coasteering is accessible in Anglesey and there many outdoor activity centres offering coasteering trips on Anglesey.

Anglesey has a thriving sailing community. The island is home to six yacht clubs catering for both coastal dinghy sailing to offshore yachting. During August each year, the Island hosts the Menai Strait Regatta, with the 2018 regatta attracting approximately 100 boats. A highlight of this Regatta is the Round Anglesey race which has taken place since 1966 and which is a non-stop circumnavigation of the Island. Much of Anglesey coastline is the subject of low to moderate amounts of nearshore, recreational boating activity.

Anglesey is one of the UK's top dive destinations. Dive operators provide trips to offshore dive sites, however many of the sites can be accessed from the shore which increases its popularity with recreational divers, as can be seen from Plate 25-4. This shows a number of popular dive spots on

Anglesey's West Coast. The area known as the Fangs to the South Stack Light House is characterised by bare rocky outcrops, volcanic rocks and steep cliffs. The main diving area is around Rip-Tide Rock and the Fangs which together form a series of inlets and submerged reefs. The Fangs are a pair of drying rocks that lie 100-150 m south of Tide Rip Rock. Many vessels have sunk along this coastline.

Anglesey has a growing surfing community, with both North Wales residents and visitors accessing the island's beaches to surf. The island's surf is inconsistent compared to other regions of Wales and the wider UK and suitable swell for good quality surfing is predominantly confined to the winter months. The island's best surfing locations, where the wave regime and bathymetry produce the best surfing waves, are on the south-westerly facing coastline, for example at Rhosneigr.

Anglesey is a popular destination for sea kayaking for novices and experienced paddlers. Sea kayaking takes place all around the island's coastal waters, but the north coast of Anglesey has a challenging combination of steep cliffs, strong tidal streams, offshore islands and sheltered bays. The area of sea around Holy Island including the MDZ is particularly challenging in nature and generally only recommended for experienced kayakers (Krawiecki and Biggs, 2013). The sea kayaking community, including local clubs and local kayaking training providers, will be kept informed of the development of the site particularly during construction period and the cable laying closer to shore. This will be backed up by the introduction of relevant signage.

3. METHODOLOGY

Morlais propose a two-step approach to assess current tourism activities on Holy Island and the surrounding area. This will be done through an economic analysis of publically available data and through interviews with local tourism and recreation businesses. The interviews will provide context to the economic analysis.

Economic analysis is performed to compliment the work already done by Morlais and provide an approach to develop a baseline and allow future assessment of the project. This economic analysis is based on the information available by NOMIS (www.nomisweb.co.uk), a service provided by the Office for National Statistics (ONS) on up-to-date UK labour market statistics from official sources. This information is used to assess the importance of the tourism and recreation sector on Holy Island.

NOMIS provides data for the Business Register and Employment Survey, which gives employee jobs estimates by industry. The NOMIS industries identified to represent the tourism and recreation sector are:

- I : Accommodation and food service activities
- R : Arts, entertainment and recreation

Data is available between 2015 and 2018, with the most recent update/revision was on 26 September 2019. This information is available at Lower Layer Super Output Areas (LLSOA) and at County level. The LLSOA used are:

Lower Layer Super Output Areas	Area
W01000030	Holy Island
W01000039	Holy Island
W01000040	Holy Island
W01000017	Holy Island
W01000029	Holyhead
W01000033	Holyhead
W01000034	Holyhead
W01000036	Holyhead
W01000037	Holyhead
W01000016	Holyhead

For example, employment information for Holy Island is obtained by using the data available for LLSOA W01000030, W01000039, W01000040, and W01000017.

Information is also available on for tourist attractions on Holy Island (incl. Holyhead)². These tourist attractions are:

- 1) Holyhead Maritime Museum (visitor numbers available between 2017 and 2018)
- 2) RibRide (visitor numbers available between 2016 and 2018)
- 3) South Stack Cliffs Nature Reserve (visitor numbers available between 2014 and 2018)

Information is also available for other attractions on Anglesey, which are used as control to compare the tourist activities on Holy Island (incl. Holyhead) with others on Anglesey. These other tourist attractions are:

- 1) Beaumaris Castle (visitor numbers available between 2014 and 2018)
- 2) Newborough National Nature Reserve & Forest (visitor numbers available between 2014 and 2018)
- 3) Amlwch Copper Kingdom (visitor numbers available between 2014 and 2018, excluding 2016)

This information can provide an indication on the number of visitors to Holy Island (incl. Holyhead) and compare this trend with Anglesey.

Interviews were held to capture the views of local businesses that could be impacted by the development. These businesses were selected because of their location and to have a broad view of the sector. Morlais has attempted to visit the following 14 tourism and recreation businesses:

1. Silver Bay Holiday Village, Pentre Gwyddel, Rhoscolyn, LL65 2RZ
2. Blackthorn Farm, Penrhos Feilw, Holyhead, LL65 2LT
3. South Stack Coastal Retreats, South Stack Road, Holyhead LL65 1YH
4. Bodwarren Farm, Penrhos Feilw, Holyhead, LL65 2LU
5. Anglesey Holidays/Cliff Apartments, Lon Isallt, Trearddur Bay, LL65 2UR
6. Anglesey Caravan Parks, Lon Isallt, Trearddur Bay, LL65 2UP
7. Catch 22 Brasserie, London Road Valley, LL65 3DP

² See <https://gov.wales/sites/default/files/statistics-and-research/2019-05/visits-tourist-attractions-2017-summary.pdf> and <https://gov.wales/sites/default/files/statistics-and-research/2020-01/visits-to-tourist-attractions-in-wales-2018.pdf>.

8. Sea Shanty Café, Lon St Ffraid, Trearddur Bay, LL65 2YR
9. Trearddur Bay Hotel, Lon Isallt, Trearddur Bay, LL65 2UN
10. Anglesey Adventures, Ffordd Beibio, Holyhead, LL65 2EN
11. Sea Kayaking UK, 1, Canada Gardens, Cyttir Rd, Holyhead, LL65 2RD
12. RibRide, Porth Daniel, Water St, Menai Bridge LL59 5DE
13. RSPB Visitor centre, Holyhead LL65 1YH
14. The Black Seal, Lon St Ffraid, Trearddur Bay, LL65 2UP

Figure 3.1 – Location of Tourism and Recreation Businesses



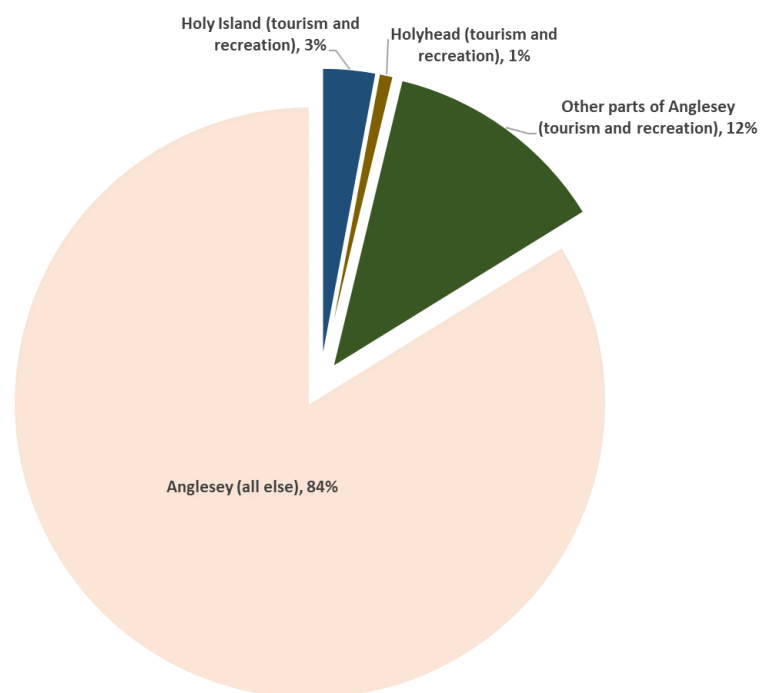
While Catch22 (7) is not near to the proposed Morlais development, it is used as a control sample (i.e. its performance should be independent of any impact by Morlais and, therefore, provides an independent barometer of tourism and recreation activity in the area).

4. ECONOMIC ANALYSIS

The construction of the Morlais tidal energy project and its subsequent operation will have an impact (both positive and negative) on Holy Island and Anglesey's tourism sector as previously identified within the ES. Morlais recognises the importance of the tourism sector to the area as highlighted by the following analysis.

Total employment on Isle of Anglesey in 2018 was 21,000, with 16.2% of people working in the tourism and recreation sector. Of those who worked in the tourism and recreation sector, 3.0% worked on Holy Island, 0.8% worked in Holyhead, and 12.4% worked elsewhere on Anglesey.

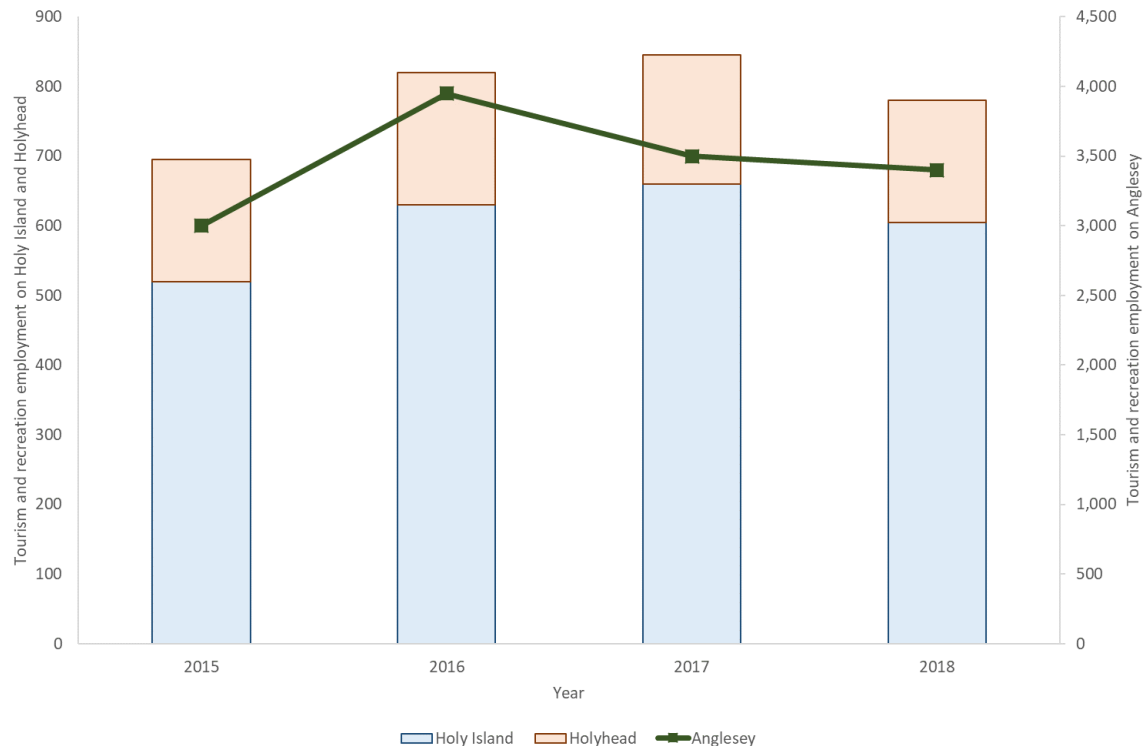
Figure 4.1 – Anglesey employment structure (2018)



The tourism and recreation sector is an important employer on Holy Island, accounting for 39.4% of total employment in 2014 (however, this declines to 15.0% if Holyhead is included). For comparison, 15.8% of Anglesey total employment was in the tourism and recreation sector in the same year. By 2018, this proportion had increased to 41.0% for Holy Island (and to 18.1% if Holyhead was included). This change happened while total employment on Holy Island increased by 11.7% between 2014 and 2018 (tourism and recreation employment increased by 16.3% over the same

period). When Holyhead is included, total employment decreased by 6.7% between 2014 and 2018 but tourism and recreation employment increased by 12.2% to 780 person.

Figure 4.2 – Changes in tourism and recreation employment



As seen in Figure 4.1, tourism and recreation employment declined on Holy Island (8.3%, or 7.7% if Holyhead was included) and on Anglesey (3.8%) between 2017 and 2018. This happened despite an increase in total employment of 10.0% on Anglesey.

There were over 113,000 visitors to the South Stack Cliffs Nature Reserve in 2014, which grew steadily to 117,989 by 2018 (an average annual growth of 0.9%). Given the location of the South Stack Cliffs Nature Reserve, this increase in visitors is a good proxy for the trend in the number of visitors visiting South Stack. For comparison, the number of visitors that visited the Amlwch Copper Kingdom, Newborough National Nature Reserve & Forest and Beaumaris Castle grew (on average) by 1.4%, 12.2% and 13.8% per year respectively over the same period. Given the location of the Amlwch Copper Kingdom, Newborough National Nature Reserve & Forest and Beaumaris Castle on Anglesey, these are good proxies for the trend in the number of visitors to other parts of Anglesey, and can be compared with visitors to South Stack (via. The South Stack Cliffs Nature Reserve proxy).

[illegible]

Year	Amlwch Copper Kingdom	Beaumaris Castle	Newborough National Nature Reserve & Forest	South Stack Cliffs Nature Reserve
2014	100	100	100	100
2015	143	95	105	100
2016	125	95	163	101
2017	107	105	149	106
2018	105	113	158	103

Information is also available for visitor numbers to Holyhead Maritime Museum (located within Holyhead) and RibRide (located in Menai Bridge but launch from Holyhead at particular time of the year and make full use of the coast around Holy Island). Between 2016 and 2018, there was an increase in the number of visitors to RibRide by (average) 5.7% per year. The number of visitors to Holyhead Maritime Museum increased by 17.2% between 2017 and 2018, increasing from 4,149 to 4,861.

5. SUMMARY OF INTERVIEWS

The potential impact of Morlais on the local tourism and recreation sector is identified through face-to-face interviews. Interviews were held with 8 different businesses, which provide a broad view of the sector. The feedback received during the interviews are presented in Section 5.1.

Holy Island is an important tourist destination given its scenery, natural environment, peacefulness, and access to the coastal paths. Tourists come from all over the UK to visit the Island (not only the North West of England) and the area is a popular attraction with international tourists given the ease of access (via. the international airport in Manchester and the ferry port in Holyhead). The climate-friendly image of the area is important for tourists, given the recent expectation of alternatives to plastic straws and the increased use of electric car charging points. While many visitors come to walk the coastal path, a large proportion of visitors come to the area to participate in marine recreation activities, such as sea kayaking and coasteering. Local businesses have invested in new offerings to profit from the area's popularity.

There are concerns that the Morlais development could adversely impact the offering of the area to tourists. For example, through restrictions on kayaking routes, the impact on eddy currents, traffic congestion during the construction phase, access to the coastal paths, and the impact on the scenery.

Despite these concerns, there are others that believe Morlais will have a positive impact on the local tourism sector, and there are businesses that have already experienced this. Contractors and engineers working on the development stay in the local area, which benefits local hotels and restaurants and this trend is only expected to grow as the Morlais development progresses. The importance of 'business tourists' was highlighted given those who come to the area on business during the week will return on holidays with their family.

While Morlais brings contractors and engineers to stay and eat in the area, the development could also benefit the local tourism and recreation sector in other ways. There are businesses that believe tourists will be interested in seeing the tidal energy development (i.e. 'industrial tourism'), and that Morlais is a continuation of Anglesey's rich history of innovation and relationship with the sea. Experimentarium in Copenhagen was given as an example of how new technology and innovation can be used to attract visitors to the area.

All tourism and recreation businesses and Morlais attempt to add value to the natural resources of the Island, enhance the image of the Island as a tourist destination, and recognise the need to tackle climate change.

The answers provided to the questionnaires provides an insight into the potential impact the Morlais development could have on the local tourism and recreation sector. Chapter 25 of the ES previously submitted identifies a total of 12 significant impacts and the questionnaires provides further insight into these. We have detailed below the impacts from the ES that have been identified through consultation with IACC as requiring additional assessment in this report.

1. Impact 1: Social benefits - Decentralisation of economic growth;
N/a for this report.
2. Impact 2: Wellbeing of future generations - Green branding for locality;
Through its objective of producing renewable energy from tidal power, the Morlais development will significantly contribute to the place branding of the area in renewable and clean energy. This provides a new opportunity for the local tourism sector by giving it the prospect of accessing the niche energy tourism sector.
3. Impact 3: Economic impacts - Direct and secondary income;
N/A for this report
4. Impact 4: Economic impacts - Accumulation of grant support;
N/a for this report
5. Impact 5: Level of commerce activity - Green cluster creation;
The Morlais development has the potential to become an anchor institution given its size and level of investment, which could support to the formation of a marine clean energy cluster in the area.
6. Impact 6: Job opportunities –Numbers;
N/a for this report.
7. Impact 7: Job opportunities - Types, quality, skills areas;
N/a for this report.
8. Impact 8: Training Impacts - New skills and competence needs;
N/a for this report.
9. Impact 9: Training Impacts - Tertiary (Bachelor of Science (BSc), Doctor of Philosophy (PhD));
N/a for this report.
10. Impact 10: Additional local services - New technical skills, workboats, cranes, better marine knowledge;

N/a applicable for this report.

11. Impact 11: Energy security - More green electricity, local supply, diversity of supply; and

N/a applicable for this report.

12. Impact 12: Decarbonisation - Clean energy, balancing services, spin-off capacity.

Through its objective of producing renewable energy from tidal power, the Morlais development will significantly contribute to the place branding of the area in renewable and clean energy. This provides a new opportunity for the local tourism sector by giving it the prospect of accessing the niche energy tourism sector.

5.1 INDIVIDUAL RESPONSES

Ref.	Address	Comments
1.	Bodwarren Farm, Penrhos Feilw, Holyhead, LL65 2LU	<ul style="list-style-type: none"> Blackthorn Farm is a 160 acres beef and sheep working farm located on Holy Island. The farm employs two people part time and seasonal workers as required. The farm land is dispersed across Holy Island, with tractors travelling on the roads to get access. Feeder wagons and lorries carrying fertilizer make regular visits to the farm. The farm decided to convert old sheds beside the house into holiday cottages circa. 10 years ago and this has been an ongoing project since 2006. The cottages have gone from being a 26 week let to 38 week let, and have (on average) 20 people staying in the cottages per week. The farm also has two shepherd huts and the intention is to have another hut (depending on cost). The cottages and shepherd huts provide casual employment opportunities for local people. Circa. 45% of customers are recurring guests with the seclusion and peacefulness of the cottages and shepherd huts being the main attraction of the accommodations. The views from the shepherd huts are also a major attraction. There has been considerable uplift in the offering of tourism activities, through the establishment of new restaurants and cafes in the area, mountain biking, coasteering and sea kayaking, historical/archaeology activities, and the dog friendly atmosphere. The coastal path is the “jewel” in what Anglesey can offer visitors. All of these have contributed to the growth of tourism in the area, a trend that is expected to continue. Anything that impacts access to the coastal paths, noise levels or the views would be considered a threat to their tourism business. According to Blackthorn Farm there isn’t enough advertisement of what is happening on Anglesey (e.g. Oriol Môn, Ucheldre) and greater resources are required to promote different activities that would be of interest to tourists (and locals). There is also a need to tackle the poor image of Holyhead.
2.	RibRide, Porth Daniel, Water St, Menai Bridge LL59 5DE	<ul style="list-style-type: none"> RibRide is a sustainable boat tour operator offering three different sea experience; adventure in the Menai Strait, explorer tour to the islands and high cliffs of Holyhead, and velocity high speed tours. The

		<p>company has 11 boats and employs 7 full time people, and operates out of Menai Bridge and Holyhead harbour.</p> <ul style="list-style-type: none"> • While the company was established 15 years ago, they have experienced exponential growth in the last 5 years. This is driven by developing products to allow people with no experience/skills to participate in adventure and the work done to promote Anglesey as a tourist destination. It is anticipated that this growth will continue over the next five years. Circa. 10% of business is from recurring visitors. • The company believes that the Morlais will benefit their business given that: <ul style="list-style-type: none"> ○ customers of RibRide will be interested in seeing the tidal stream energy site (i.e. industrial tourism), ○ Morlais is a continuation of Anglesey's history of innovation, which should be highlighted through visitors attraction (e.g. Experimentarium in Copenhagen), ○ both RibRide and Morlais add value to the natural resources of the Island, which enhances the image of the Island as a tourist destination (e.g. "the ocean is a battery"), and ○ highlights the importance of tackling climate change. • The Well-being and Futures Generation Act is important for the business, and they are already considering how to make their boats environmentally friendly. • According to RibRide there needs to be a change in how tourism is viewed as a career choice in schools and that there needs to be greater coordination between the public and private sector in the provision of FE/HE courses related to tourism.
3.	Catch 22 Brasserie, London Road Valley, LL65 3DP	<ul style="list-style-type: none"> • Catch22 is a new restaurant that opened in Valley in 2017 and has seen growth in visitors over the past three years. In particular, there has been a considerable increase in visitors' out-of-season, which is partially driven by the TV exposure the Island has recently had. The majority of customers stay near the restaurant. • Despite the circa. 10% year-on-year growth, Catch22 is not considering expanding because of the challenges of maintaining standards across multiple sites and the uncertainty with off-peak tourists. However, the company is considering offering holiday cottages given the shortage in the area during peak season. • Catch22 believes that Morlais will be of benefit to the local tourism sector given that:

		<ul style="list-style-type: none"> ○ they will bring contractors into the area that will need to stay somewhere (already know of contractors that have stayed at Hotel Cymyran) and are likely to visit local restaurants. Catch22 have already experienced this by having marine energy engineers visit the restaurant, ○ they will contribute to the image of Anglesey as being a clean climate location, which has been important for tourists over the past 12 months, • (Similar to RibRide) According to Catch22 there needs to be a change in how tourism is viewed as a career choice in schools and that there needs to be greater coordination between the public and private sector in the provision of FE/HE courses related to tourism.
4.	Anglesey Adventures, Ffordd Beibio, Holyhead, LL65 2EN	<ul style="list-style-type: none"> • Anglesey Adventures is an adventure activity company that provides adventure days and breaks on Anglesey. A key offering of its services is kayaking around North and South Stack because of the tidal flow. • The company was successful in having 2,000 customers last year and is likely to exceed that number this year. The success of the business is primarily to the location and natural environment of Anglesey (“the mecca of kayaking”). The work of organisation promoting Anglesey as a tourist destination have also had an impact on their business. • The importance of kayaking in the area is highlighted by the Anglesey Sea Symposium that has been held in the area for the past 30 years. • Threats to their business includes any unplanned disruption to the roads around Holy Island, any restrictions to kayaking routes, and anything that impairs the image/views of the area. • According to Anglesey Adventures there needs to be greater investment in changing facilities and toilets on the beaches, which would complement the costal public footpath and better promotion to local people of what is going on.
5.	Trearddur Bay Hotel, Lon Isallt, Trearddur Bay, LL65 2UN	<ul style="list-style-type: none"> • The Trearddur Bay Hotel is situated in a prime position overlooking the beach at Trearddur Bay. It currently offers 47 bedrooms, a bar, a restaurant, and wedding/conference facilities. • There has been considerable growth in local tourism over the past 3 years, driven by the location’s ability to offer more choices to eat, stay, and outdoor activities. The hotel is used for conferences

		<p>during the week, which leads to family holidays on the weekends. The 'empty nesters' market is key for the Treaddur Bay Hotel.</p> <ul style="list-style-type: none"> • Given the growth of tourism in the area (which they anticipated to continue), the company is going to invest in another 16 rooms. • Despite this, the company does recognise threats to its business; any decrease in disposable income or a downturn in the economy that will impact the number of conferences held at the hotel. • The Treaddur Bay Hotel believes Morlais will benefit their business by bringing contractors into the area that will need to stay somewhere and are likely to visit local restaurants. The hotel has already benefited from the Morlais project given the events already held at the hotel and the engineers that have stayed there. It was noted that many of those who come to the area on business during the week will return on holidays with their family. • Climate change is important for young visitors to the area and the Treaddur Bay Hotel has seen a steady use in nearby charging points for cars. When installed, they were rarely used but are now used by many people. • (Similar to RibRide and Catch22) there needs to be a change in how tourism is viewed as a career choice in schools and that there needs to be greater coordination between the public and private sector in the provision of FE/HE courses related to tourism. The Irish tourism apprenticeship scheme was given as a good example.
6.	The Black Seal, Lon St Ffraid, Trearddur Bay, LL65 2UP	<ul style="list-style-type: none"> • The Black Seal is a restaurant and bar in Trearddur Bay located right next to the beach. It has seen steady improvement in business over the past 3 years and has invested recently in an outdoor bar, which has helped attract customers. • Given the current business climate it is difficult to know what will happen to tourism in the future. While visitors came to the area because it is quiet and has a relaxing atmosphere, change in the weather will have a big impact in the number of tourists and any change in prices (compared with other holiday destinations). • Anglesey as a climate friendly location is important for attracting visitors (e.g. the complaints received because of restaurants and bars using plastic straws). The Black Seal recognises the importance of this and sends its staff to help with tidying the beach.

		<ul style="list-style-type: none"> • (Similar to Anglesey Adventures) According to the Black Seal there needs to be greater investment in changing facilities and toilets on the beaches, which would complement the costal public footpath.
7.	William Stewart, Holyhead Breakwater Country Park, Holyhead, LL65 1YG	<ul style="list-style-type: none"> • William Stewart is the Isle of Anglesey County Council Officer responsible for Holyhead Breakwater Country Park, located on the north side of Holy Island, and has considerable knowledge about visitor trends in the area given his +20 years' experience of working on Holy Island. • There has been a substantial increase in the number of visitors to Holyhead Breakwater Country Park, especially in those who come for one day. People visit to view the birds, scenery, history, and stress free environment. • The Port of Holyhead plays a key part in attracting visitors to the Park, with many people (e.g. Brazilians) coming over on the ferry from Ireland to spend the day on Holy Island. In addition, there has been a growing trend of people visiting the Park before catching the ferry over to Ireland; the visit is part of their journey. • While the Park is part of the Cybi Walking Path (and the wider Anglesey Costal Path and the Wales Costal Path), people would visit the Park but not other parts of Holy Island. • It is estimated that over 100,000 people visit the Park each year.
8.	Jenny Wong, Snowdonia Canoe Club (www.snowdoniacanoecub.org)	<ul style="list-style-type: none"> • The marine recreation sector includes four micro-segmentation, each of which would have different views regarding tidal energy. These micro-segments are (1) sea kayaking, (2) sit-on-top fishermen, (3) stand-up paddle boarders, and (4) coasteering. Of these, sea kayaking is the biggest community. The Club has between 60 and 100 members across the region. • Holy Island is unique in its offering for sea kayakers given the variety of tidal waves available for beginners as well as expert users. Anglesey itself is a great location for sea kayaking as it's possible to go out regardless of the weather. • The Club has concerns over the impact the Morlais energy project will have on the eddy current (i.e. the circular current of water) and the risk of collision. • The Club is preparing a survey of its members to assess the likely impact Morlais will have on the local marine recreation sector. This will involve gathering information from its members on usage, number of visitors, and analysis on the benefit of the sector to the local economy.

		<ul style="list-style-type: none">• Given that sea kayaking is considered a low-key recreation activity on Anglesey, there needs to be better advertisement of the sport and highlight the unique environment the Island has to offer.
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6. CASE STUDIES

Three case studies are presented to compliment the findings from the questionnaires. Two consider the impact of marine energy projects on tourism while the third considers the impact of offshore wind turbines on tourism.

These case studies provide national evidence of the impact marine, clean energy can have on the tourism industry. The cases studies suggest that the production of marine energy has no or negligible impact on local tourism activities. For example, a study of the Pembrokeshire Demonstration Zone found that only 3.5% would be put off visiting the area again due to marine renewable energy developments. However, it should be noted that these visitors might be displaced and visit other parts of the region where the marine energy development isn't apparent.

Offshore wind farms are a method of producing renewable energy in the sea but have a significant impact on the visualisation of the locality due to their size and appearance above the water. However, the offshore wind farm Gwynt y Môr located off the coast of North Wales is found to have little, if any, impact on the number of visitors to Llandudno, despite it being the fifth largest operating offshore wind farm in the world. The impact of tidal marine energy, which is much less visual, is therefore expected to have little, if any, impact on local tourism.

Energy tourism is a new, growing niche segment of the tourism sector. The Morlais development provides a unique opportunity for the tourism of Holy Island and surrounding area to tap into this niche segment by supporting the island offering to visitors a low/zero carbon holiday and recreation experience. This offering would be unique and with global appeal given the current focus by the public on climate change.

6.1 ORKNEY ISLAND

Paragraph 181 of Chapter 25 of the ES identified the benefits that green branding has had to Orkney. The last decade has brought major change to the Orkney Islands, which have become a frontrunner in the implementation of renewable energy because they can boast some of the strongest wind, wave and tidal resources in Europe.³ Despite the number of renewable energy developments on the islands and the natural beauty of its landscape, researchers found most of the residents perceive no

³ See Orkney Renewable Energy Forum (OREF), 2015 Orkney Renewable Energy Forum (OREF) Orkney's energy. Retrieved August 22, 2015, from <http://www.oref.co.uk/orkneys-energy/> (2015).

strong negative effects of the presence of the wind turbines.⁴ For many, the turbines were neither a positive nor a negative change and some residents described that after initial concerns or excitement, the turbine became part of the landscape and stated that it is now just there.

The Orkney Islands are a popular tourist destination because of scenery and the history and culture.⁵ The development of renewable energy projects around the Islands has not deterred visitors from coming; a total of 174,273 visits were made to Orkney in 2017, with the total value of visits totalling £49.5 million, up from 142,816 and £31.1 million in 2013.⁶ With so many wave and tidal devices working in the waters, the Orkney Council has had to train local tour guides on marine renewables to help deal with questions from tourists and convert office space to help educate and inform the visitors.⁷

6.2 PEMBROKESHIRE DEMONSTRATION ZONE (PDZ)

The Pembrokeshire Demonstration Zone (PDZ) is a 90km² area of sea leased from the Crown Estate by Wave Hub Ltd. The PDZ is located between 15 and 21 kilometres off the south Pembrokeshire coast with water depths of between 50-62 metres, and has the potential to support three wave energy arrays of up to 30MW generating capacity each, together with a pre-commercial 90MW floating wind demonstration project.⁸

Research has been done by Marine Energy Research Group (Swansea University) to assess the value of the marine environment around St. David's, Pembrokeshire, where a tidal stream turbine demonstration project is underway and larger array developments, both wave and tidal, are planned for the next few years.⁹ They found that the marine environment contributed, on average, to 78% of visitors' total enjoyment of the area and that only 3.5%, would be put off visiting the area again due to marine renewable energy developments. Underwater, non-visible devices were shown to have

⁴ See Esther C.van der Waal. (2019) Local impact of community renewable energy: A case study of an Orcadian community-led wind scheme. *Energy Policy*. Article in press. Available at <https://doi.org/10.1016/j.enpol.2019.111193>.

⁵ See <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/orkney-report---may-18.pdf>.

⁶ See <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/orkney-report---may-18.pdf>.

⁷ See <https://www.theguardian.com/environment/2011/sep/20/orkney-renewable-energy-future>.

⁸ See <https://www.marineenergywales.co.uk/marine-energy-in-wales/demonstration-zones/pembrokeshire-demonstration-zone/>.

⁹ See Voke, M., Fairley, I., Willis, M., and Ian Masters. (2013) Economic evaluation of the recreational value of the coastal environment in a marine renewables deployment area. *Ocean & Coastal Management*, 78, pp.77-87. Available at <https://www.sciencedirect.com/science/article/pii/S096456911300080X#cebib0010>.

the least impact on people's enjoyment of the marine environment compared to surface based designs. The authors concluded that marine energy developments should not affect tourist revenue.

6.3 GWYNT Y MÔR (LLANDUDNO OFFSHORE WIND TURBINES)

Gwynt y Môr is a 576MW offshore wind farm located off the coast of North Wales and is the fifth largest operating offshore windfarm in the world, with 160 wind turbines of 150 metres height above mean sea level. Construction began in 2012, power production started in September 2013, construction phase ended in November 2014, and final commissioning occurred in June 2015.

Prior to being built, the £2bn project attracted opposition with fears about the impact the development could have on tourism in Llandudno.¹⁰ However, these fears may have been unfounded. Some studies found positive feelings towards seeing wind turbines in the landscape to personal attitudes to green energy,¹¹ while others found that tourists' reaction to wind turbines appears to be affected by how and where they see them.¹² In general, they prefer to see them in the distance and preferably off-shore. A specific study on wind turbines in Wales found that they have a negligible impact on national tourism sector, and where negative effects do occur, these are often in the form of displacement to other nearby areas.¹³

Despite the size of the farm and height of the wind turbines, Gwynt y Môr appears to have had little (if any) impact on the tourism sector in Llandudno since becoming fully operational in 2015. This is evidenced by the continued growth in visitor numbers to the seaside resort. A popular visitor attraction in Llandudno is the Great Orme Tramway, which takes passengers from Llandudno Victoria Station to just below the summit of the Great Orme headland. According to Welsh Government, the number of visitors to the Great Orme Tramway increased by 7.4% between 2014 and 2018 (or 1.8% average growth per annum).¹⁴

¹⁰ See http://news.bbc.co.uk/1/hi/wales/north_west/4695250.stm.

¹¹ See

[http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/4_Visitor_Insights/WindFarm-VAS-\(FINAL\)-\(2\).pdf?ext=.pdf](http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/4_Visitor_Insights/WindFarm-VAS-(FINAL)-(2).pdf?ext=.pdf).

¹² See http://www.shropshiretourism.co.uk/providers/literature_review_wind_turbines_and_tourism_2_.pdf

¹³ See https://gov.wales/sites/default/files/publications/2019-06/potential-economic-impact-of-wind-farms-on-welsh-tourism_0.pdf.

¹⁴ See <https://gov.wales/sites/default/files/statistics-and-research/2019-05/visits-tourist-attractions-2017-summary.pdf> and <https://gov.wales/sites/default/files/statistics-and-research/2020-01/visits-to-tourist-attractions-in-wales-2018.pdf>.

6.4 ENERGY TOURISM

A study on energy tourism focusing in the city of Gussing, Austria has been published.¹⁵ The authors mentioned that ‘energy tourism’ consists of a new niche-tourism segment offering a knowledge-driven and meaningful holiday experience. They stated the example of the eco-energy region of Gussing, Austria which indicates that expert-oriented tourism can be developed offering various benefits to the local economy and contributing in the mitigation of climate change. In addition, a report on energy tourism has been published.¹⁶ The authors mentioned the interrelationship between energy and tourism focusing on ‘energy tourism’ as a niche of ‘industrial tourism’. They stated that ‘energy tourism’ is a new perspective on the energy and tourism nexus. A hotel located in Vienna, has been transformed into a zero-energy balance hotel.¹⁷ This has been achieved with the use of solar thermal panels, solar-PV technology and ground source heat pumps. Additionally the hotel encourages its guests to use low-carbon transportation while it uses recycling in its daily operations.

¹⁵ See A. Jiricka, B. Salak, R. Eder, A. Arnberger & U. Probstl. “Energetic tourism: exploring the experience quality of renewable energies as a new sustainable tourism market”. Sustainable Tourism IV, Transactions on Ecology and the Environment, Vol. 139, 2010

¹⁶ See B. Frantal & R. Urbankova. “Energy tourism: An emerging field of study”. Current Issues in Tourism, Vol. 20(13), pp. 1395-1412, 2017.

¹⁷ See <https://www.hotelstadthalle.at/en/boutiquehotel/zero-energy-balance.html>.

7. CURRENT POLICIES

There are a number of policies and strategies by Isle of Anglesey County Council to protect and promote the natural environment of the Island and the tourism sector. These policies have already been considered in Table 25-1 of Chapter 25 of the ES and have been expanded upon below.

Morlais recognises the work done in promoting and maintain Anglesey as a tourist destination, and it is eager to support the objectives of the Council and develop mitigation actions that fits in with these policies and strategies.

7.1 AREA OF OUTSTANDING NATURAL BEAUTY (AONB)¹⁸

The Isle of Anglesey AONB Management Plan evaluates and determines what the special qualities of the AONB are, then determines what actions are required to ensure that these qualities are conserved and enhanced for future generations. The administration of the AONB is overseen by the Joint Advisory Committee (JAC) which consists of organisations who wish to participate in the work of promoting and protecting the AONB. Morlais recognises the importance of Anglesey as an AONB and is represented on the JAC through Menter Môn.¹⁹

In addition to the work done by Menter Môn in supporting Anglesey as an AONB, Morlais would contribute through;

- Investing in low carbon energy production to help secure a stable energy future for Wales.
- Establishing world-class facilities to place Anglesey as a leading location for low carbon energy innovation and demonstration.
- Ensuring that local companies and people benefit and take advantage of opportunities from new energy investments.

7.2 DESTINATION ANGLESEY MANAGEMENT PLAN²⁰

The Destination Anglesey Management Plan (DMP) will help direct the development of tourism for the Isle of Anglesey for the period 2016 to 2020, with the aim of setting direction and laying the

¹⁸ See <https://www.anglesey.gov.uk/documents/Docs-en/Countryside/Anglesey-AONB-Management-Plan-2015-%E2%80%93-2020.pdf>.

¹⁹ Morlais is a project by Menter Môn to develop Anglesey's tidal energy industry.

²⁰ See <https://www.anglesey.gov.uk/documents/Docs-en/Business/Destination-Anglesey/Destination-Anglesey-Management-Plan-2016-2020.pdf>.

foundations for the future development of tourism on Anglesey beyond 2020. The Chairman of Destination Anglesey Partnership was Phil Scott, owner of RibRide.²¹

Destination Management is a process of coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment. Morlais shares the statement of intent to manage a destination over a period of time. In addition to the work done by Menter Môn, Morlais will help Anglesey meet its objectives through;

- Promoting the Anglesey brand as a low-carbon, environmentally friendly destination that is contributing towards tackling climate change.
- Enhance the quality of Anglesey's tourism offer by introducing concepts from 'industrial tourism' and 'energy tourism'.
- Invest resources to ensure that Anglesey can fully capitalise on the potential inward investment, contributing positively to the economic prosperity of Anglesey.
- Provide additional international exposure to the Island, given the contractors and engineers that will come to the area to work on the development and then return for a holiday with their family.

The Morlais development also provides a unique opportunity to develop a low/zero carbon tourist destination and attract the growing, niche energy tourism market. This would provide a new avenue for promoting tourism on Anglesey (in particular Holy island), especially given the importance of climate change to the general public.

7.3 THE LANDSCAPE PARTNERSHIP PROJECT²²

Holy Island, along with Carrneddau uplands area of northern Snowdonia, has recently been awarded a combined £2.8M National Lottery grant. This grant allows both landscapes to benefit from extensive conservation and enhanced protection of their important natural habitat as well as historic features, like dry stone walls and other buildings. The proposal for Holy Island will involve conserving its rich and diverse local heritage, but also managing and promoting its role in shaping and supporting local community well-being and economic regeneration.

In addition to the work done by Menter Môn to compliment this project, Morlais will support local community well-being and economic regeneration by providing employment opportunities for local

²¹ RibRide participated in a face-to-face interview (see Section 5).

²² See <https://www.heritagefund.org.uk/news/wales-natural-heritage-boosted-ps4million-national-lottery>.

people and procurement opportunities for local businesses. There is an established link between an individual's well-being and their participation in the labour market.²³

²³ See <https://www.oecd-ilibrary.org/docserver/9789264194830-5-en.pdf?expires=1582209824&id=id&accname=ocid177405a&checksum=038B6A8F2EEFB66CA93F5808E9A29343>.

8. KEY PERFORMANCE INDICATOR

Visitors come to Holy Island because of the scenery, natural environment, peacefulness, and access to the coastal paths, and unique sea conditions for marine recreation activities. Key performance indicators should reflect changes in Holy Island's offering as a tourist destination. Any impact in these offering will result in changes to the number of visitors to the area and the activities they participate in.

Therefore, key performance indicators can capture Holy Island's offering as a tourist destination by considering measures that capture visitors and recreation activities in the area. These measures should include;

- Employment in the local tourism and recreation sector,
- Visitor numbers to key attractions in the area, and
- Local business sentiment of the sector,

These measures can be captured by:

- 1) Continue to analyse the publically available economic data presented in Section 4 to identify trends and unexpected changes. This data will be analysed over the next two years to produce a baseline, and every year thereafter to identify any significant deviation away from the trend implied by the baseline.
- 2) Morlais propose installing counting solutions technology (e.g. www.eco-compteur.com/en/home/) along the costal path nearby the proposed energy project to determine trends in trail usage. These counting solutions technology will be installed as soon as possible with the aim of collecting 2 years' worth of data before construction. This 2 years of data will contribute to the construction of a baseline provide a baseline. Ongoing collection of data will identify any significant deviation away from the trend implied by the baseline²⁴.
- 3) Continue with the interviews (presented in Section 5) over the next two years to identify the performance and future expectations of the local sector. This information will be used to compliment the quantitative data collected in stage 1 and 2. Morlais propose to conduct

²⁴ As part of this installation of counting solutions technology, Morlais is prepared to share the data collected with Isle of Anglesey County Council as required to support the Council's own analysis of Anglesey's tourism sector.

these interviews every year for the next five years, then biennial for the duration of the energy project as part of the monitoring process.

9. MITIGATION ACTIONS

Morlais recognises that it could have a negative impact on the tourism and recreation sector on Holy Island. Negative impacts would be identified by significant deviation from trends implied by the baseline attributable to Morlais. If such attributable negative impacts would occur then Morlais propose to implement mitigation actions to negate the effects of the development.

Suggestions for mitigation actions have been proposed by the industry during the face-to-face interviews. These include;

- Providing financial support to enhance the provision of Further Education (FE) (including work-based apprenticeships) courses specific to the tourism and recreation sector on the Island. For example the formation of a programme similar to the Irish tourism apprenticeship scheme. Support for such provision would also enhance the tourism and recreation sector and complement the strategies and programmes of Isle of Anglesey County Council by improving the offering and quality of the service provided in the area. Such enhancements to FE courses would also help professionalise the sector and support its evolution to becoming a career choice for school-leavers.
- Improving the awareness of Holy Island as a tourist destination, including highlighting the activities in the area and the marine recreation activities. Such advertisement/media campaign would help attract visitors to the area, and help counter any negative impacts Morlais has on the local tourism and recreation sector. There would be a strategic approach to implement the advertisement/media campaign so as to compliment Isle of Anglesey County Council strategies and programmes for the area (e.g. ensuring that there isn't a concentration of visitors on Holy Island, so that high visitor numbers don't have an adverse effect).
- Investing in changing facilities and toilets on the beaches of Holy Island near the proposed Morlais development. This would compliment the costal public footpath and marine recreation activities in the area, and enhance the attraction of the area to tourists. This need was identified during the face-to-face interviews, and would complement the strategies and programmes of Isle of Anglesey County Council by improving the offering and quality of the service provided in the area.

However, the mitigation actions should be relevant to the tourism and recreation sector's need when the negative impacts occur. The ongoing interviews capture the needs of the sector and can be used to ensure mitigation actions are relevant and timely.

Regardless of deviation to the baseline, Morlais propose locating information boards near the proposed developments to inform tourists of the tidal energy project.

Figure 9.1 – Example of an information board



In addition, Morlais will continue to hold information events across Anglesey to ensure the general public and visitors are aware of the project, its purpose, benefits, and contribution in tackling climate change.

The project as a demonstration zone could, if successfully promoted, attract additional and new types of visitors to Anglesey including, for example, undergraduate and postgraduate students, international energy developers and specialists with the sector. If the right interpretation (being sensitive to its location) is provided as part of this promotion, this could in turn also help to mitigate (or in some cases enhance/compensate) confirmed effects including seascape, landscape and visual effects.

10. MONITORING

There is a requirement that Morlais identifies a baseline for the tourism and recreation sector on Holy Island and put in place a monitoring process (in accordance with the EIA regulations) to identify any changes in tourism and recreation activities. Tourism and recreation are major contributors to the local economy on Holy Island. The development of offshore facilities that harness tidal power to generate electricity could affect the natural beauty that draws visitors to those areas. However, at this time, there is little data on the possible impacts of Morlais to Holy Island tourism and recreation.

Visitors come to Holy Island because of the scenery, natural environment, peacefulness, and access to the coastal paths, and unique sea conditions for marine recreation activities. Any impact on these offerings will result in changes to the number of visitors to the area and the activities they participate in. Such changes will be reflected in the economic data, data collected by the counting solutions technology, and response to the interviews.

Morlais propose a triangulation approach for identifying a baseline and monitoring the impact, if any, of the tidal energy project on tourism and recreation activities at Holy Island. This approach would involve:

- 1) Continue to analyse the publically available economic data presented in Section 4 to identify trends and unexpected changes. This data will be analysed over the next two years to produce a baseline, and every year thereafter to identify any significant deviation away from the trend implied by the baseline.
- 2) Morlais propose installing counting solutions technology (e.g. www.eco-compteur.com/en/home/) along the costal path nearby the proposed energy project to determine trends in trail usage. These counting solutions technology will be installed as soon as possible with the aim of collecting 2 years' worth of data before construction. This 2 years of data will contribute to the construction of a baseline provide a baseline. Ongoing collection of data will identify any significant deviation away from the trend implied by the baseline²⁵.
- 3) Continue with the interviews (presented in Section 5) over the next two years to identify the performance and future expectations of the local sector. This information will be used to

²⁵ As part of this installation of counting solutions technology, Morlais is prepared to share the data collected with Isle of Anglesey County Council as required to support the Council's own analysis of Anglesey's tourism sector.

compliment the quantitative data collected in stage 1 and 2. Morlais propose to conduct these interviews every year for the next five years, then biennial for the duration of the energy project as part of the monitoring process.

All three stages will provide a baseline and an approach to measure the impact, if any, of the Morlais development during the construction phase and operational phase.

It is proposed that Morlais and the Isle of Anglesey County Council will meet to agree the baseline. Morlais and Isle of Anglesey County Council should then meet every year to determine if there has been significant deviation away from the trend implied by the baseline and the reason for the deviation. This will be concluded by analysing the economic data, data collected by the counting solutions technology, and response to the interviews. If it is evident that Morlais was the cause of unfavourable deviation from the trend implied by the baseline, then the intervention methods suggested in Section 8 will be implemented.

The mitigation measures in Section 9 and monitoring procedures in Section 10 will be further detailed in the Tourism and Recreation Monitoring Strategy that will be secured as a prior to commencement planning condition. An outline of this strategy is included as document MOR/BAU/DOC/0004.

APPENDIX A – MEETINGS

Date	Meeting
24/01/2020	Initial meeting with Isle of Anglesey County Council
30/01/2020	Meeting with Angharad Crump, Isle of Anglesey County Council.
05/02/2020	Meeting with Trefor Jones, TWJ Consulting.
06/02/2020	Interview with Bodwarren Farm, Penrhos Feilw, Holyhead, LL65 2LU.
06/02/2020	Interview with RibRide, Porth Daniel, Water St, Menai Bridge LL59 5DE.
06/02/2020	Interview with Anglesey Adventures, Ffordd Beibio, Holyhead, LL65 2EN.
07/02/2020	Interview with Trearddur Bay Hotel, Lon Isallt, Trearddur Bay, LL65 2UN.
07/02/2020	Interview with Catch 22 Brasserie, London Road Valley, LL65 3DP.
07/02/2020	Conference call with Hywel Roberts, Johnny Lewis, and James Orme (Morlais).
10/02/2020	Meeting with Angharad Crump, Isle of Anglesey County Council.
10/02/2020	Interview with The Black Seal, Lon St Ffraid, Trearddur Bay, LL65 2UP.
10/02/2020	Meeting with Sian Roberts, Regional Skills Manager with North Wales Regional Skills Partnership.
12/02/2020	Progress review with Morlais.
13/02/2020	Meeting with Michael Thomas and Angharad Crump, Isle of Anglesey County Council.
14/02/2020	Meeting with Angharad Crump, Isle of Anglesey County Council.
14/02/2020	Conference call with Colin Morris, Business Support Manager at Gwynedd County Council.
18/02/2020	Interview with William Stewart, Holyhead Breakwater Country Park, Holyhead, LL65 1YG.
19/02/2020	Meeting with (Jenny Wong) Snowdonia Canoe Club (www.snowdoniacanoecub.org).
05/03/2020	Presentation at 'Egni 2020: A Sea of Opportunities' event.