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Morlais Project

Morlais Socioeconomic Response to NRW Marine Licencing's request for further information dated 14th October 2020

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This document responds to NRW Marine Licencing's NRW Marine Licencing's request for further information dated 14th October 2020.

PART 1

Context: Clarification should be given to support why the Supplementary Tourism and Recreation Assessment did not encompass interviews with RYA affiliated clubs in the area, nor did it consider training or cruising activity.

The focus of the 'Supplementary Tourism and Recreation Assessment report' (Reference: MDZ/H1) was to provide an initial assessment and establish a methodology for assessing the impact of the MDZ on the local tourism and recreation industry.

Using data from the Office for National Statistics, total employment on Anglesey in 2018 was 21,000, with 16.2% working in the tourism and recreation sector. This 16.2% cohort can be broken down geographically as; 3.0% on Holy Island, 0.8% in Holyhead, and 12.4% elsewhere on Anglesey. Tourism and recreation, for this data, is defined as those who work in accommodation and food service-related activities and arts, entertainment and recreation. In 2018, the tourism and recreation sector accounted for 41.0% of total employment on Holy Island (18.1% if Holyhead is included). Of these 41.0%, 86% were involved in accommodation and food service activities, while 14% were in arts, entertainment, and recreation. The local economy benefits from tourism and recreation activities when money is spent in the local economy and jobs are created and sustained.

The importance of accommodation and food service activities on Holy Island (35.3% of total employment) helped guide the analysis of the 'Supplementary Tourism and Recreation Assessment report'.

Structured 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 tourism and recreation sector.

Morlais has attempted to visit 14 tourism and recreation businesses. Only 8 were willing or able to participate in the analysis and a breakdown of respondent is:

Type of enterprise	Number	Proportion
Land-based	5	62.5%
Marine-based	3	37.5%
Total	8	100.0%

This split allowed Morlais to capture different aspects of the tourism and recreation sector.

Sea Kayaking UK (based in Holyhead) was also invited to participate in the initial tourism and recreation assessment (and visited by Morlais) but did not provide any feedback. Sea Kayaking UK was visited on Friday 7 February 2020 however the manager was not available to participate in the survey. The purpose of the survey was explained to members of staff Morlais contact details were provided so that Sea Kayaking UK could participate in the survey at a future date. No response was received.

The focus of the supplementary report were (land based) tourism and recreation enterprises and activities. Morlais propose to conduct additional monitoring of marine-related activities (including boating activities), in addition to the analysis of tourism and recreation activities. The impact of the MDZ on marine-related activities will be monitored in conjunction to tourism and recreation activities. This will be completed in 2021.

PART 2

Context: We expect the applicant to provide justification around the approach to assessing the economic importance of marine tourism and recreation, in particular why consideration against the recommendations of the Seabed User and Developer Group (SUDG) have not been demonstrated.

The SUDG study of socio-economic benefits of marine industries (2019) includes a methodology for estimating the economic contribution of the UK recreation boating sector.¹ This methodology is based information collected by British Marine and on 2015 multipliers calculated in the CEBR Marine Sector Report (2017)². This provides an estimate for total employment and GVA contribution of the UK recreation boating sector.

Morlais recognises the work done in the SUDG study of socio-economic benefits of marine industries (2019), however, it would be difficult to apply this methodology to Holy Island and the surrounding area. The multipliers utilised in the SUDG study are at a national level and it would not be possible to calculate reliable and efficient multipliers at the local level.

A process to establish a baseline of activities and identify key performance indicators of the tourism and recreation activities was agreed with Isle of Anglesey County Council (see Supplementary Tourism and Recreation Assessment report). This process, which will be used to prepare a baseline and ongoing monitoring of the impact the Morlais project has on tourism and recreation activities, is described below:

- 1) Ongoing analysis of the publicly available economic data presented to identify trends and unexpected changes in local tourism and recreation activities,
- 2) Install counting solutions technology along the costal path nearby the proposed energy project to determine trends in trail usage,
- 3) Continue with the interviews over the next two years to identify the performance and future expectations of the local tourism and recreation sector. These interviews will be conducted every year thereafter.

¹ Available at <http://www.sudg.org.uk/wp-content/uploads/2019/08/ABPmer-soc-econ-SUDG-1.pdf>.

² Available at https://www.maritimeuk.org/documents/183/Cebr_Maritime_Sector_Report_2017.pdf.



Morlais propose to conduct additional monitoring of marine-related activities (including boating activities), in addition to the analysis of tourism and recreation activities. The impact of the MDZ on marine-related activities will be monitored in conjunction to tourism and recreation activities. This will be completed in 2021. RYA affiliated clubs can be included in the additional monitoring process of marine-related activities.

PART 3

Context: A number of objections on the tourism assessment were received which specifically question the approach and methodology. These should be considered and justified, as required.

In response to these objectives (reference number 47 and 64), the socio-economic response is as follows:

Structured 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 tourism and recreation sector.

Morlais has attempted to visit 14 tourism and recreation businesses. Only 8 were willing or able to participate in the analysis and a breakdown of respondent is:

Type of enterprise	Number	Proportion
Land-based	5	62.5%
Marine-based	3	37.5%
Total	8	100.0%

The marine-based enterprises were: RibRide, Anglesey Adventures, and Snowdonia Canoe Club. Sea Kayaking UK (based in Holyhead) was also invited to participate in the initial tourism and recreation assessment (and visited by Morlais) but did not provide any feedback. Sea Kayaking UK was visited on Friday 7 February 2020 however the manager was not available to participate in the survey. The purpose of the survey was explained to members of staff Morlais contact details were provided so that Sea Kayaking UK could participate in the survey at a future date. No response was received.

Kayaking activities were not dismissed by Morlais; both Anglesey Adventures and Snowdonia Canoe Club were included in the supplementary tourism and recreation assessment. In its ongoing work on analysing socio-economic matters relating to the MDZ, Morlais recognise the importance of marine activities (including kayaking) and has agreed to conduct a survey of activities, in addition to tourism and recreation activities, as part of its monitoring process. This will also involve producing a baseline of marine activities. Due to Covid-19 restrictions and subsequent uncertainty, this work will be completed in 2021.