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Morlais Project

Supplementary kayaking and sailing activities assessment

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SUPPLEMENTARY KAYAKING AND SAILING ACTIVITIES

ASSESSMENT

SEPTEMBER 2020

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1. INTRODUCTION

This report sets out the information required to support the Morlais energy development application located off Holy Island. The impact on the recreational boating economy was not previously specifically included in the Supplementary Tourism and Recreation Assessment. In light of concerns raised by RYA, and to reflect the responsible nature of the Developer, a Supplementary Kayaking And Sailing Activities Assessment has been provided which specifically commits to monitoring and mitigating negative impacts should they occur.

The overall aim of the report is to;

- outline an approach to establish a baseline of activities and identify key performance indicators of kayaking and sailing activities in the area,
- present actions to mitigate any negative effects Morlais could have on activities, and
- give an approach to monitor kayaking and sailing activities around Holy Island.

This report should be read in conjunction with the March 2020 Supplementary Tourism and Recreation Assessment report.

2. BACKGROUND

The aim of the Supplementary Tourism and Recreation Assessment report is to;

- 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.

The report includes four case studies were prepared following desktop research on the impact of marine renewable energy projects on tourism and recreation. These show that marine energy development have little impact on the tourism and recreation sector. The report outlines ways that the Morlais development will be promoted locally, including through the use of interpretation methods, which could in turn help mitigate and where it would in some cases enhance and/or compensate the confirmed effect on seascape, landscape and visual character.

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. This included interviews with Anglesey Adventures (Ffordd Beibio, Holyhead, LL65 2EN) and Jenny Wong, Snowdonia Canoe Club (www.snowdoniacanoeclub.org). A summary of these interviews is given below:

<p>Anglesey Adventures, Ffordd Beibio, Holyhead, LL65 2EN</p>	<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.
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	<ul style="list-style-type: none"> • 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.
<p>Jenny Wong, Snowdonia Canoe Club www.snowdoniacanoecub.org</p>	<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. • 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.

3. CONSULTATION RELEVANT REPRESENTATIONS

Four Public Information Days were held in 2019, which included coastal communities (two in Holyhead and one Trearddur Bay). A drop in event was also held at Trearddur Bay Sailing Club on 30th of July.

The below organisations were invited and provided with project information. In addition, the events were widely publicised on local media. In the consultation responses [MOR-ATEB-DOC-0066], there were some positive and some negative views expressed with respect to boating. No reference to the potential for an effect on the recreational boating economy was recorded at these events, with the exception of those about sea kayaking. For this reason, and the lack of expected effect, the impact on the recreational boating economy was not previously specifically included in the Supplementary Tourism and Recreation Assessment.

Organisations that were invited to Public Information Days and provided with project information

- Anglesey Adventures
- Anglesey Divers
- Anglesey School of Yachting
- Anglesey Water Sports
- Anglesey Charter Fishing
- Around Anglesey Race Organisers
- Holyhead Lifeboat Station
- Holyhead Marina
- Holyhead Sailing Club
- Canoe Wales
- North Wales Cruising Club
- Red Wharf Bay Sailing and Watersports Club
- Rhosneigr Sub-Aqua Club
- Rib Ride
- RNLi Holyhead
- Royal Anglesey Yacht Club
- Round Anglesey Race Organisers
- RYA Cymru Wales
- Sea Kayaking Wales
- The Cruising Association
- Traeth Coch Sailing Club
- Trearddur Bay Lifeboat Station
- Trearddur Bay Sailing Club
- Anglesey Sea Kayaking (provided with information)
- Anglesey Tourism Association (provided with information)

Summary of representations and objections received

In the representations to the TWAO application there was no mention of the recreational boating economy, with the exception of those about sea kayaking and the most recent RYA objection which is responded to in MOR-RHDHV-DOC-0146. However the Developer is committing to include this in the monitoring and mitigation activities for socio-economic effects.

A summary of the representations is given below:

Annie Bailey. Objection: The area is much favoured by Kayakers, Yachtsmen surfers and skiers, bird spotters, walkers and families. All of these people stay in local accommodation use local cafes, bars, restaurant and hotels. If they are not able to follow their chosen pursuit's in the area they would stay away and the result would mean a very big hole in the local economy.

Richard Tuke. Objection: I have established a tourism business from nothing and have put serious amounts of hard work and money which could well be destroyed by this scheme. My business is a Bed & Breakfast and a Caravan and Camping site, one main reason people come is for the wonderful views which will be blighted by this enormous project.

David B. Roberts. Objection: Secondly the race at Penryyn Mawr is a huge tourist attraction for sea kayakers from around the globe. If the current and tidal flow is changed in any way this will deter the visit of kayakers and the loss of more tourist income to the area.

Roger Chandler. Objection: I'm contacting you to express my concerns regarding the above proposed scheme and how it may effect business and hence tourism on Anglesey. I have run a successfully a small and dedicated sea kayaking since 2007 and with great access from the A55 over 10 companies sustain enough income to be viable, throughout the year.

Nigel Gill, 26 Llys Sychnant, Conwy, Gwynedd, LL32 8RB. Objection: What is now an important recreational, touristic and wildlife location stands to be compromised for ever by this speculative project. The potentially serious consequences for the Sea Kayaking community have not been fully assessed, nor appreciated.

Kay McManus (Chair Snowdonia Canoe Club, SSC), Angorfa, Chapel street, Penmaenmawr, LL34 6PA. Objection: We submit that sea kayakers are an important 'receptor' of potential impacts and have not been adequately represented in the Morlais impact assessment. SCC suggests that the Morlais impact assessment should include a fuller description of the sea kayak based enterprise and tourism in Holyhead and Anglesey and an assessment of project impacts on these interests.

Phil Stone. Objection: Sea kayaking is a significant activity around Anglesey with the waters around the tidal array being particularly popular. Many clubs both locally and from across the UK come to paddle in the area, and there is also a thriving guiding community taking groups out. It is highly likely that this development would have a significant impact on anyone wishing to kayak in that area.

Derek Lumb. Objection: With regard to inconvenience, many of our members will be on passage North or South through the Irish Sea and so will find the Development Zone directly on their path from Bardsey to Holyhead and diverting round the zone would add ~2 miles to the passage (not insignificant for vessels travelling at 5 or 6 knots). In this respect we ask that, once operational, a viable direct route is left through the zone on this course, not impeded by exclusion zones.

ML Public Representations 2. Objection: The cost to this poor economically environment through reduced tourism has not been calculated. There are more seakayaking coaches on Anglesey than anywhere else in the world per square mile - so businesses will be affected and the tourism from sea kayakers from around the world will move elsewhere. Just see the countries represented at the annual Anglesey Sea Kayak Symposium in May each year. I've met people from Australia to Kenya and from Canada and USA to South Africa and so many European countries. These people will go to other locations and it will impact on the economy of Sir Mon (Anglesey).

ML Public Representations 4. Objection: If this scheme is given the go ahead the beauty of the area will be decimated and lost. Tourism will be massively effected. I will lose a lot of my clients and work. People will have their dreams taken away from them.

ML Public Representations 6. Objections: The area is a "Mekka" in the world of Seakayaking and it is quite a large world. Seeing now the planning reports I have read about the MORLAIS Project in the area bears in my opinion huge risks not only for the accessibility of the area but also for the wildlife there.

ML Public Representations 34. Objection: The whole area is very popular with sailors of all sorts, and the concept of having a string of multiple connected barges would represent a clear danger to safe navigation.

ML Public Representations 71. Objection: We are very concerned that the Morlais development will: a) restrict our navigation b) change the tidal flows intensity Many of our guests travel from all over the World to enjoy the World famous tide races of Penrhyn Mawr, South Stack and North Stack. These areas are very important for skill development and surfing activities.

ML Public Representations 115. Objection: There are at least 15 companies employing more than 30 qualified guides/coaches making use of the seas around Anglesey including Holyhead. Many of these are full time and active throughout the year (see for example <https://www.coastalspirit.com/events> and <https://seakayakingwales.com/bookings-page/>).

4. KEY PERFORMANCE INDICATORS

Holy Island is a popular area with kayakers and sailors because of the scenery, natural environment, peacefulness, access to coastal paths, and sea conditions. Key performance indicators should reflect changes in Holy Island's offering as a location for kayaking and sailing activities. Any impact in these offerings will result in changes to the number of participants and the activities they participate in.

Therefore, key performance indicators can capture Holy Island's offering as a location for kayaking and sailing activities. These measures should include:

- Kayaking and sailing participation in the area,
- Sentiment of marine recreation activities.

There is no suitable publicly available data to identify trends and unexpected changes. Therefore, key performance indicators can only be captured by:

- 1) Interviews over the next two years to identify the activities and future expectations of kayaking and sailing. 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.

This analysis will be supplemented with the outcomes from the key performance indicators outlined in Supplementary Tourism and Recreation Assessment report.

5. MITIGATION ACTIONS

Morlais recognises that some stakeholders perceive it could have a negative impact on kayaking and sailing activities around 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.

Mitigation actions have been proposed by the tourism and recreation industry during the face-to-face interviews (see Supplementary Tourism and Recreation Assessment report). These are also relevant to kayaking and sailing activities;

- Providing financial support to widen access to kayaking and sailing activities on the Island.
- Improving the awareness of Holy Island as a tourist destination, including highlighting the activities in the area and the marine recreation activities.
- Investing in changing facilities and toilets on the beaches of Holy Island near the proposed Morlais development.

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

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.

6. MONITORING

There is a requirement that Morlais identifies a baseline for kayaking and sailing activities around Holy Island and put in place a monitoring process to identify any changes. The scenery, natural environment, peacefulness, and access to the coast paths, and the sea condition has made the area around Holy Island popular with kayaking and sailing activities. The development of offshore facilities that harness tidal power to generate electricity could affect these recreation activities. However, currently, there is little data on the possible impacts of Morlais to Holy Island marine recreation activities.

In addition to the triangulation approach for identifying a baseline and monitoring any impact of the tidal energy project on tourism and recreation activities at Holy Island, Morlais propose the following to capture any impact on kayaking and sailing activities:

- 1) Conduct interviews (similar to that presented in Section 5 of Supplementary Tourism and Recreation Assessment report) over the next two years to identify the current and future kayaking and sailing activities near Holy Island. 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.

These interviews, along with those for the tourism and recreation sector, will provide a baseline and an approach to monitor the impact, if any, of the Morlais development during the construction 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. 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 4 will be implemented.