



# Valuing Wales' seas and coasts

*Consumer research*

Commissioned by WWF Cymru

October 2012

## OVERVIEW

The coastal and marine environment is an incredible natural asset, contributing £6.8 billion to the economy of Wales and supporting more than 92,000 jobs. Over 60% of the population of Wales live and work in the coastal zone, with all our major cities and many important towns located on the coast. The stunning and varied coastline around Wales also helps explain the importance of the tourism industry, which contributes over £700 million each year to the Welsh economy (this figure excludes multiplier effects).

Wales' seas support an amazing variety of habitats and species, including kelp forests, tidal mudflats, seagrass meadows, dolphins, whales, sharks, turtles and cold-water corals. Yet despite the fundamental importance of our coasts and seas to our way of life, the continued degradation of marine habitats and ever expanding development of Welsh seas is putting our marine life at risk.

For over ten years, WWF Cymru has been campaigning for greater protection for marine habitats and species and better management of our seas and coastal environment. The recent public consultation by the Welsh Government on proposals to create a small number of Marine Conservation Zones in Welsh waters is a positive opportunity to improve the management of Welsh seas. We hope that these new sites will bolt on to existing Welsh Marine Protected Areas to increase the resilience of Welsh seas to increasing human activities and pressures and other factors such as climate change.

WWF Cymru has commissioned a number of surveys to explore the public's perceptions of the health of the Welsh marine environment and the ways in which we gain enjoyment from our coasts and seas. Our 2012 survey contains interesting findings and examines the population's interest, values and concern for the marine environment in Wales.

The key findings of the survey are outlined below.

## METHODOLOGY

Face to face interviews with 1018 adults across Wales were carried out in October 2012 by Beaufort Research Ltd. The Omnibus survey is designed to be representative of the adult population resident in Wales aged 16 and over and to reflect the demographic profile of Welsh residents.

The regions are based on groups of authorities:

North Wales: Wrexham, Flintshire, Denbighshire, Conwy, Anglesey, Gwynedd

Mid/West Wales: Powys, Ceredigion, Carmarthenshire, Pembrokeshire

West South Wales: Swansea, Neath & Port Talbot, Bridgend

Valleys: Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent

Cardiff & S E Wales: Cardiff, Vale of Glamorgan, Torfaen, Monmouthshire, Newport

Respondents were asked a number of questions regarding their attitudes towards the Welsh marine environment. (See appendix 1 for a list of the questions).

## KEY FINDINGS

Welsh people clearly value our beaches and coasts in Wales, with almost three out of four people in Wales (75%) agreeing that the Welsh coast is an important part of their life. Walking along the coastline was identified as the main activity people undertake at the beach (61%) which has increased significantly from 47% in 2007. WWF Cymru commissioned Beaufort Research Ltd to conduct a similar survey which included this exact question, a key reason behind this increase could be the result of creating more coastal paths as part of the Wales Coast Path.

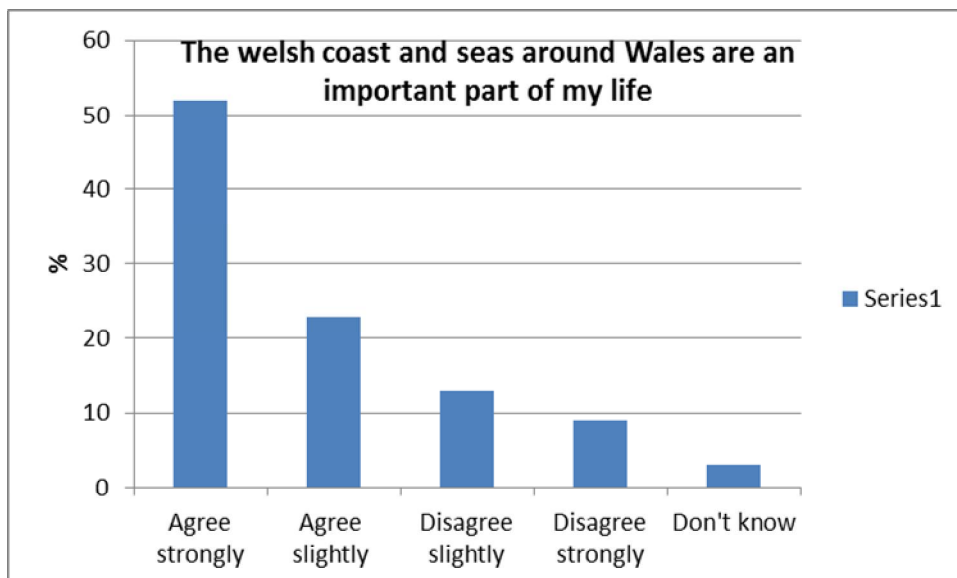
The survey demonstrates that the Welsh Government needs to step up its efforts to protect Welsh seas as only 26% of the population believe they are doing enough and only 1% say they should do less. Whilst 30% didn't have an opinion and 43% want the government to do more.

There is strong support for the establishment of Marine Conservation Zones to protect wildlife and habits in Welsh seas. Almost eight out of ten people in Wales support their establishment with even more support in North Wales (86%); which was the highest of all regions in Wales.

Welsh people remain concerned about the effects of climate change and sea level upon their lives (67%) but with this increasing to 83% in West Wales and West South Wales. This is comparatively similar to the result of our survey in 2007 when 70% of the population expressed concern about the effect of climate change. This highlights that climate change is still a real concern to Welsh people despite a perception that it is less of a concern given the economic downturn.

### Valuing our seas

Respondents were asked to what extent they agreed or disagreed with the following statement: *The Welsh coast and the seas around Wales are an important part of my life*



Seventy five per cent (75%) of those surveyed either agreed or strongly agreed that the Welsh coast and seas are important to their lives. Those living in West South Wales

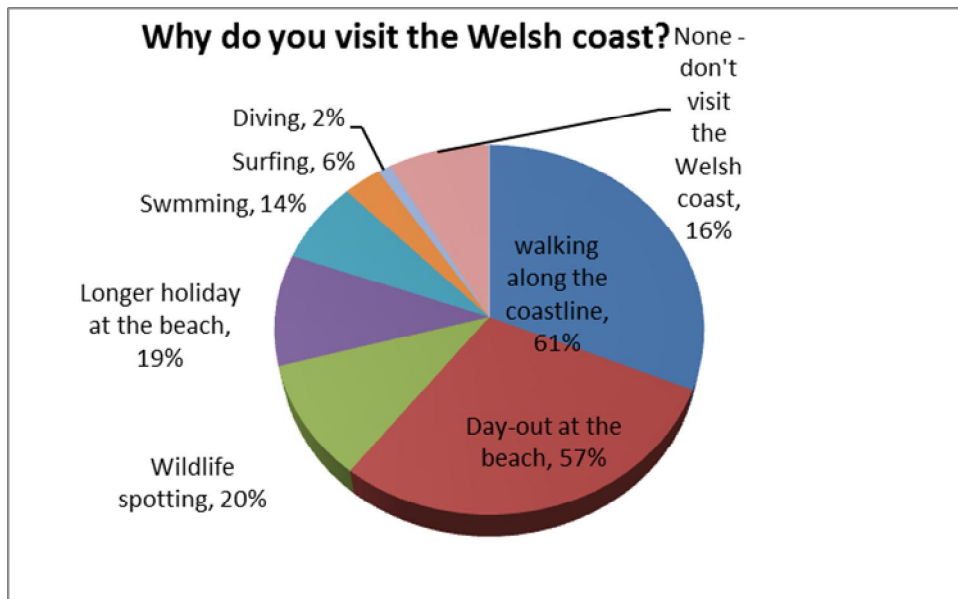
(83%); Mid and West Wales (83%) and North Wales (80%) value our seas and beaches most. The results indicate that the older we get the more we value our seas as 54% of the 16-24 age group agreed with this statement compared with 83% of the 45 – 65 age group.

#### Effects of climate change

**Respondents** were asked to what extent they agreed or disagreed with the following statement: *I am concerned about the effects of climate change and sea level rise* Sixty seven per cent (67%) of respondents expressed concern about the effects of climate change and sea level rise, with over a quarter (38%) strongly agreeing with the above statement. Concern over climate change and sea level rise was greatest in Mid and West Wales (72% of respondents) and less of a concern for people in the valleys (56%) These results demonstrate that over the last five years Welsh people’s concern about climate change has remained high. In 2007 it was only a slight increase of 70% who stated their concern. This illustrates that despite the economic downturn people are still concerned about the environment and these issues in particular.

#### Activities in and around Wales’ coastline

All respondents were asked if they had used the coast and seas around Wales and for what purpose.



The most popular activity highlighted by respondents (61%) was walking the coastline; followed by a day- out at the beach (57%). These suggest that the changes to improved access of coastal walks in Wales has had a positive impact with more people walking the coast than five years ago. People living nearer the sea visit the coast most which demonstrates the important contribution of the coastal and marine environment to the economy of Wales, as well as contributing to our quality of life and well-being.

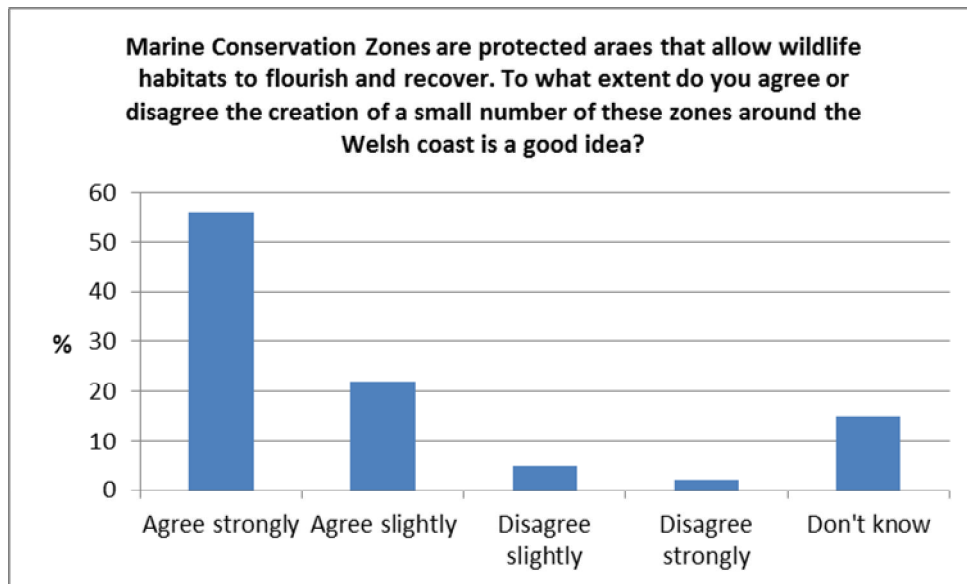
Wildlife spotting and longer holidays at the beach, were the next two most popular activities which underlines the inter connection between protecting habitats and species and coastal.

### Welsh Government protection for seas

Respondents were *asked*: Which of the following best describes your opinion of the Welsh Government's effort to protect the Welsh seas?

Only 26% believe that the Welsh Government is doing enough to protect Welsh seas; whilst 43% of respondent want the Welsh Government to do more to protect the marine environment. Over a quarter of residents didn't have an opinion which suggests that they are unaware of the Welsh Government work in this important area.

### Marine Conservation Zones



Seventy eight per cent of the Welsh population agreed with this statement, with nearly nine in ten agreeing in North Wales (86%). Of this 62% agreed strongly and 23% slightly agreed. Only 7 % of the Welsh population disagreed with the need for a small number of Marine Conservation Zones.

### Conclusion

A thriving marine environment is essential not just for wildlife but also for the economy of Wales. This survey demonstrates that Welsh seas are important to Wales and valued by the people of Wales. It is clear that action to improve and protect the health and productivity of Welsh seas is supported by the public. Welsh Government should take swift action to improve the management of Welsh seas and provide greater protection for marine habitats and species.

Marine Protected Areas, including the creation of a small number of Marine Conservation Zones, are vital in safeguarding marine biodiversity today and for the future. We urge Welsh Government to announce the results of its consultation into the

establishment of 'Marine Conservation Zones' in Welsh seas and set out the next steps it will take to do so.

APPENDIX 1

SHOWCARD A

Q1 Can you please tell me to what extent you agree or disagree with the following statements?

1. The Welsh coast and the seas around Wales are an important part of my life
2. I am concerned about the effects of climate change and sea level rise

Agree strongly  
Agree slightly  
Disagree slightly  
Disagree strongly

Don't know

SHOWCARD B

Q2 For what reasons do you visit the Welsh coast?

CODE ALL MENTIONED

Wildlife spotting  
Walking along the coastline  
Swimming  
Surfing  
Diving  
Day-out at the beach  
Longer holiday at the beach

None – I don't visit the Welsh coast

Don't know

4. Which of the following best describes your opinion of Welsh Government's efforts to protect the Welsh seas?

Welsh Government should do more to protect Welsh seas  
Welsh Government are already doing enough to protect Welsh seas  
Welsh Government should do less to protect Welsh seas  
Don't know

Q4 Marine Conservation Zones are protected areas that allow wildlife habitats to flourish and recover? To what extent do you agree or disagree that the creation of a small number of these zones around the Welsh coast is a good idea?

Agree strongly  
Agree slightly  
Disagree slightly  
Disagree strongly

Don't know