What Blue Flag means to Wales
Survey Report 2017
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Introduction

2018 marks the 30th year of the Blue Flag Award in Wales, which is generally considered the ‘gold standard’ for beaches across the world. The Blue Flag Programme is owned by the non-governmental, non-profit organisation ‘Foundation for Environmental Education’ (FEE). The Blue Flag Programme was started in France in 1985. It has been operating in Europe since 1987 and in areas outside of Europe since 2001. The programme is currently in operation in 46 countries across the world. In Wales, the award is managed by Keep Wales Tidy.

Wales has over 100 beaches which are EU designated bathing waters, 45 of which are currently Blue Flag standard. (Lists of 2017 award beaches can be found in Appendix 1). The Blue Flag Award stands for high quality water, safety and access but education about the environment is at its core. This includes the provision of educational environmental activities in the local area and the provision of information on local biodiversity and ecosystems to visitors. The award criteria are detailed further in the next section.

Although predominantly an environmental award, the longevity and increasing global recognition of the programme has started to demonstrate social and economic impacts too. Our survey on perceptions of the Blue Flag Award was published on social media in July 2017 and very quickly surpassed the target of 500 respondents. The aim of the survey (questions can be seen in Appendix 2) was to find out the level of recognition and understanding of the Blue Flag Award and the potential impact it has on visitor decisions. A smaller survey was conducted with businesses who operated on/ near a Blue Flag beach to assess their views of the award, specifically through the lens of business in order to get a snapshot of how the award is viewed by them and its potential economic value.

Both surveys indicated a very high level of recognition and understanding of the award and demonstrated that it has become an entrenched standard of quality, particularly for UK destinations. Although the reasons for visitors visiting a particular beach came down to a number of tangible and non-tangible factors, the values behind the Blue Flag criteria – in particular cleanliness and safety – appeared time and time again as ‘deal-breaking’ priorities. Businesses that we surveyed demonstrated a slightly higher level of awareness of the criteria and also overwhelmingly considered the award to have a positive impact on their business.

It is important to note that all of our coastline, whether designated or non-designated, provides a diverse range of benefits to people, wildlife and industry alike and the sustainable management of our seas and coasts is critical to ensuring that these areas continue to thrive. Although this report is centred on the perceptions of people and land-based business, the wider benefits of a clean, biodiverse and well managed coastline should not be underestimated.

Over 60% of the population of Wales live and work on the coast where growing coastal tourism is estimated to be worth £602 million (2013). The Wales Coast Path – another world first for Wales – runs for 870 miles and has provided an economic boost of £23.6 million.

Coastal communities tend to enjoy better overall health but are considered especially vulnerable to changes such as extreme weather events, sea level rises and pollution, making the health of these populations intrinsically linked to the health of the coastal environment.

Welsh territorial seas cover some 32,000-square km making Wales’s marine area much bigger than its territorial landmass. Within this, there are 129 marine nature conservation sites which are designated for the national and international importance.

As the award enters its 30th year, the Volvo Ocean Race will also be hosted (for the first time) in Cardiff, Visit Wales launches the Year of the Sea and the Welsh Government and stakeholders from all sectors have
come together to develop real action to support the global ‘Clean Seas’ campaign. These combined efforts signal a step change in how we view, communicate and care for our extensive marine environment from the Welsh Government to communities and visitors.

### About the Blue Flag Award

The Blue Flag Programme strives to promote sustainable development in the coastal areas through high water quality standards, safety standards, environmental management standards and environmental education. It works to bring together the tourism and environmental sectors at the local, regional and national levels.³

The programme requires that beaches meet a list of 33 minimum criteria (although countries can require additional obligations if they choose to do so). As an international award a small number of beach criteria are only applicable to some regions of the world. Beach operators who wish to meet the standard must apply every year and FEE and the National Operator (Keep Wales Tidy) has the right to refuse or withdraw the award if they are not meeting their obligations.

A beach is eligible for the Blue Flag Award if:

- It is a nationally (or internationally) officially designated bathing area with at least one sampling point for water quality analyses.
- The beach must have the necessary facilities and standards including EU Bathing Water Directive “excellent” bathing water standard to comply with the Blue Flag criteria.
- A responsible person in the local authority must be appointed to deal with the relations to the Blue Flag Programme.
- The beach must be accessible for unannounced inspection by FEE and the National Operator.
Summarised criteria for a Blue Flag Beach include (but are not limited to):

**Environmental Education and Information**
- Information about the Blue Flag Programme and other FEE eco awards must be displayed
- Information relating to coastal zone eco-systems and natural, sensitive areas in the coastal zone must be displayed
- Information about bathing water quality must be displayed
- Code of conduct for the beach area must be displayed and the laws governing beach use must be easily available to the public upon request
- A minimum of 5 environmental education activities must be offered to users and be promoted at the beach
- A map of the beach showing key facilities and services offered must be displayed at the beach

**Water Quality**
- Compliance with the requirements, frequency and standards for excellent bathing water quality
- No industrial or sewage related discharges may affect the beach area
- Monitoring on the health of coral reefs located in the vicinity of the beach
- Compliance of the community with requirements for sewage treatment and effluent quality
- The water must be visibly clean and clear of pollutants such as oil and litter

**Environmental Management**
- A beach management committee must be established to be in charge of instituting and monitoring environmental management systems
- The beach must comply with all regulations affecting the location and operation of the beach (coastal zone planning and environmental legislation)
- Environmentally sensitive areas at or near the beach may require a specific management plan. Beach operators are advised to consult with appropriate conservation bodies for advice.
- The beach must be clean
- Algae or other vegetation should be left to decay on the beach unless it constitutes a nuisance
- Waste disposal bins/receptacles must be available on/by the beach in adequate numbers, regularly maintained and emptied
- Facilities for receiving recyclable waste materials must be available on/by the beach
- Adequate and clean sanitary facilities with controlled sewage disposal
- On the beach there will be no unauthorised camping or driving and no dumping
- Regulation concerning dogs and other domestic animals on the beach must be strictly enforced
- All buildings and equipment of the beach must be properly maintained
- Marine and freshwater sensitive habitats such as coral reefs or sea grass beds in the vicinity of the beach must be monitored
- Sustainable means of transportation must be promoted in the beach area

**Safety and services**
- Appropriate public safety control measures must be implemented. An adequate number of lifeguards and/or lifesaving equipment must be available at the beach according to the site risk assessment
- First aid equipment must be available on the beach
- There must be management of different users and uses of the beach so as to prevent conflicts and accidents
- Emergency plans to cope with pollution safety risks must be in place
- There must be safe access to the beach
• A supply of potable drinking water must be available on the beach
• A minimum of one Blue Flag beach in each municipality must have access and toilet facilities provided for disabled persons

§ Guideline criteria

Further resources

• For a map of Wales’ Award-winning beaches and the National criteria: www.keepwalestidy.cymru/our-beaches
• More information about the award can be found on the global Blue Flag website: www.blueflag.global/

Other Awards

The Blue Flag Award is also available to marinas and more recently tourism based boat operators that meet the similar criteria of environmental education, information and management, safety and service and water quality. There is also provision for smaller marinas to enter into agreement with larger sites in order to provide the level of facilities required. More information on the Blue Flag for Marinas and Boat Tour Operators can be found here.

In addition to the Blue Flag Award, Keep Wales Tidy also manages the national awards which include the Green Coast Award and the Seaside Award.

The Green Coast Award recognises the excellent water quality and unspoiled environment of our ‘hidden gems’ in Wales, but unlike a Blue Flag Award beach, these sites won’t have the infrastructure and intensive management generally associated with more traditional seaside resorts. Importantly, this award encourages people to ‘adopt’ areas of the coast, helping contribute towards the sustainability of the area while promoting volunteering.

Wales currently has 25 beaches which have been awarded this status. A map of these sites and Green Coast criteria can be found here.

The Seaside Award is operated in Wales, Scotland and Northern Ireland and is awarded to coastal destinations with exceptional facilities. 85 beaches in Wales achieved this award in 2017. Criteria and information can be found here.
Public perceptions of the Blue Flag Award for beaches

Considering the longevity of the award, there has not been a great deal of research done into the wider impacts of the award in terms of the social and economic benefits. The award is primarily an environmental award and there is little doubt that it has played a significant role in increasing the environmental quality and standards of beaches across the world, it stands to reason that a visible reduction in environmental quality would have an impact on visitor numbers and therefore have a negative economic impact on coastal communities that rely on tourism.

In a literature review on past research on this subject, we found a small number of studies which looked at various aspects of the Blue Flag Award and how it relates to people’s decision to visit that beach in particular. It is encouraging to note that many of these studies reflect some of the findings from our survey results, most notably that beaches have a special role in many of our lives and can be affected by the tangible (i.e.; facilities, transport, shops) and the intangible (i.e.; the sense of place, memories and reputation). Secondly, studies have shown that even visitors who choose to visit non-Blue Flag Award beaches are motivated to do so by largely same criteria as visitors who actively seek out the Award beaches, primarily factors of cleanliness and safety. So, even though the award may not affect someone’s decision, the underlying criteria is important to them.

Visitor perceptions of the Blue Flag Award – Survey Results

- Over 96% of people are aware of the Blue Flag Award
- 67% knew whether their favourite beach had the Blue Flag Award or not
- 70% of people said that cleanliness was their main reason for visiting a particular beach
- Over 40% of people cited safety, access to walking routes and parking facilities as the main attractions for a particular beach
- 30% of people chose their favourite beach on the basis of the Blue Flag Award status
- 90% of people understood the Blue Flag Award to stand for cleanliness, safety and water quality
- 67% of visitors said that the loss of a Blue Flag would possibly or almost certainly change their perception of the beach (only 22% said that it would not affect their perception)
- Two thirds of visitors said that it would possibly or certainly affect their decision to go to that beach in particular.

The survey demonstrated that there is an overwhelming recognition and a good understanding of what the award represents. All 22 local authority areas in Wales were represented in the survey (most commonly Pembrokeshire Carmarthenshire and Cardiff), as well as a small number of responses from England.

Almost half of respondents lived close to their favourite beach. Of those who didn’t, more visited their favourite beach on a day trip than those holidaying in the area. Only a very small minority said they didn’t
visit beaches, which reflects the continued popularity of visiting beaches and the implications this has on tourism in Wales.

Cleanliness was by far the most common reason given by people for liking their favourite beach, which highlights the importance of beach cleaning and maintenance. Indeed, the vast majority thought the Blue Flag Award stands for beaches and waters which are clean and safe and when asked to name (or guess) 3 Blue Flag Award criteria, safety and cleanliness was again mentioned by most respondents. Safety, easy parking and access to walking routes were also important factors.

96% of respondents had heard of the Blue Flag Award, and respondents most commonly thought it operated just in Europe. Almost a third of respondents said the Blue Flag Award would influence their decision when they went on holiday (although this was primarily a factor for UK destinations rather than abroad).

Although many respondents said the Blue Flag Award didn’t affect their decision to visit their favourite beach, for many this was because the beach was close to where they lived. This is unsurprising given that 60% of people in Wales live or work in coastal areas and 83% of respondents came from Welsh coastal authorities.

Around two thirds of respondents thought they knew whether or not their favourite beach had a Blue Flag Award. When asked whether the loss of a Blue Flag Award would change their perception of the beach, the most common answer given was that it would, with many of these saying that this was on the basis that they would consider the beach to be less clean or safe.

Many respondents indicated that the loss of a Blue Flag Award might affect their decision to visit their favourite beach whilst some indicated that it certainly would.

Who responded to the survey?

The visitor survey was completed by a total of 521 people, representing each of Wales’ 22 local authorities as well as some from outside of Wales. Most responses came from Pembrokeshire (17.1%), Carmarthenshire (16.9%) and Cardiff (11.17%), while Blaenau Gwent, Flintshire, Merthyr Tydfil, Torfaen and Wrexham each made up less than 1% of the responses. 3.1% of responses came from outside Wales, including from counties adjacent to the Welsh border but also from as far away as Manchester, London and Cornwall.
People of all ages responded to our survey, but the most common age ranges were 45-54 (24.4%) and 55-65 (23.2%), which between them accounted for almost half of the respondents. Those aged 35 and above made up more than 85% of responses and very few young people, under the age of 25 responded to the survey. The gender split of respondents was fairly even, with females accounting for 59.2% and males making up 40.8% of respondents.

Reasons for visiting a beach

We asked respondents to consider their favourite beach and asked them to indicate what the usual nature of their visit was. Half of respondents indicated that they lived close to a beach. This is not surprising given the demographics of Wales and our more populous coastal areas. A third of respondents visited their favourite beaches on a day trip, whilst around 16% said they went on holiday to the area.

A very small minority (1.3%) stated that the question was not applicable, as they didn’t visit beaches. While the survey is likely to have attracted responses from those with an interest in beaches, this in itself is significant as it reflects the popularity of beaches with many people and the implications of this ‘draw’ for tourism in Wales.

Again, we asked respondents to consider their favourite beach and asked them to tell us what they liked about that location in particular. We offered a series of choices for this question but also allowed for an ‘other’ option to be indicated.

At 70.4%, beach cleanliness was by far the most common reason given by respondents for liking their favourite beach. Safety, easy parking and access to walking routes are also popular reasons given, all mentioned by more than 40% of people. Safety could be related to issues such as sea currents, but was also frequently linked to water quality.

Easy parking highlights the importance of beaches being easily accessible by car, while access to walking routes suggests that many people enjoy walking by the coast during visits to their favourite beach. With the Wales Coast Path stretching 870 miles from the river Dee to Chepstow, no Welsh beach is far from the path and these responses reflect the value of this by local residents and visitors alike.
A third (33%) of respondents cited wildlife as a reason for liking their favourite beach, while almost a quarter (24.4%) mentioned that the beach was convenient for other areas of interest. Less significant factors included that the beach was good for water sports (13.4%) and the presence of lifeguards (9.8%).

Almost a quarter (24.4%) of respondents said that there were ‘other’ reasons for liking their favourite beach, and these responses have been categorised as follows:

- **Beauty/Views** included responses mentioning words such as ‘scenery’, ‘attractive’, landscape’, ‘seascape’ and ‘stunning’.
- **Dog Walking/Friendly** included responses mentioning phrases such as where dogs were ‘allowed’, where they can be ‘let off the lead’ and where they can be walked ‘all year round’.
- **Facilities** included food, toilets, water sports, parking and events.
- **Memories**
- **No Dogs**
- **Peaceful/Quiet** included responses mentioning words such as ‘little known’, ‘deserted’, ‘uncrowded’ and ‘empty’.
- **Proximity/Access** included responses mentioning phrases such as ‘within walking distance’, ‘close to home’ (or holiday home/hut) and ‘convenient’.
- **Swimming**
- **Wild/Unspoilt** included responses mentioning words such as ‘natural’, ‘rural’, ‘remote’, ‘open space’ and ‘undeveloped’.
- **Wildlife**
- **Uncategorised**
Some of these categories relate to factors already mentioned above. The most common category was beauty/views, which was mentioned by almost a third (28.4%) of those who used the ‘other’ category. This was followed by the category of peaceful/quiet, mentioned by over 21% of the ‘other’ category.

Walking the dog on the beach was also another important issue, mentioned by 13.4% of the ‘other’ category, while proximity/access (11%) and wild/unspoilt (9.5%) were also popular reasons given.

Uncategorised comments included those who simply stated ‘not applicable’ as well as respondents who mentioned things like:

- Other uses of the beach e.g. running and horse riding
- Having a beach hut or holiday cottage there
- The beach being ‘lovely’
- The geography of the beach itself e.g. large or sandy
- The sense of place linked to the beach e.g. ‘it’s home’

Many of these indicated a very personal or emotive connection to a particular beach or the sea more generally.

“The beach for me provides a sense of wellbeing beyond compare.”

“Beautiful – ideal for photography as well as walking”

“I love walking my dog in the fresh air with the sea breeze and the ebb and flow of the tide.”

“Wonderful views and frequently deserted.”

“I could just sit and watch the movement of waves and birds for hours”

“Peace and quiet, away from the noise of the traffic.”

“It’s great in the winter when the dog can be off the lead and we don’t have to pretend it is warm!”

“Wild open beach with nothing around it – natural”

“A lovely vast expanse of beach”
“Happy memories”

“Nobody else knows about it!”

Awareness of the Blue Flag Award

This set of questions aimed to find out the awareness of the award itself. It is encouraging to see that the vast majority (96.3%) of survey respondents had heard of the award and over two thirds knew whether their favourite beach was a Blue Flag beach or not. The knowledge of the scale of the award was also encouraging and reflects the award’s progress in the UK and Europe and, only more recently, elsewhere in the world.

Have you heard of the Blue Flag Award?

- Yes 96.3%
- No 3.7%

Do you think the Blue Flag Award is:

- International 45.0%
- Just in Europe 43.3%
- Just in the UK 11.7%
- Don’t know 0.0%

Do you know if your favourite beach has the Blue Flag Award?

- Yes it does 44.9%
- No it doesn’t 24.9%
- Don’t know 30.2%
Influence of the Blue Flag Award

We asked whether the Blue Flag Award had an impact on whether they chose to go to this beach in particular. Although the majority of respondents indicated ‘no’ to this question, further analysis of the comments indicates that this does not represent the full picture.

This question gave an opportunity for respondents to explain their answers and 285 people did so. While the responses were complex, they have been categorised to help give more insight into the influence of the Blue Flag Award. The information in this section covers only the respondents who provided more information (which represents 58.5% of those who answered this question).

17.5% of respondents said ‘no’ fully or partly because the beach in question was close to where they lived or to where they went on holiday. Convenience is therefore an important factor in beach choice, regardless of award status.

34% of respondents said ‘no’ but their comments were neutral. This category included those who:
• Indicated that other factors dictated that this was their beach of choice
• Said that they’d visited the beach since childhood or before the Blue Flag Award began
• Knew or were fond of the nature of the beach and visited it regardless of award
• Didn’t know whether or not the beach had the award
• Simply said that the beach in question was one they liked

A quarter of respondents said ‘no’ but their comments in fact indicated the Blue Flag Award had a positive bearing on their decision, even if it wasn’t a deciding factor. This included comments that:
• The award affected their opinion of the beach or made it more appealing
• They were pleased that the beach had the award, and had a sense of pride if local beaches had the award
• They knew the beach was nice and/or had facilities
• The Blue Flag Award was one of many deciding factors
• The Blue Flag Award would become more important if they were there with young family
• The Blue Flag Award was useful to those who didn’t know the area or that it would be useful if they were away from home
• Related to swimming (which indicated that they were aware that the award signified good water quality)

Only a minority (8.07%) of respondents said ‘no’ and had negative comments about the Blue Flag Award. These included the following factors:
• That Blue Flag Award attracting crowds due to their status and facilities
• They had a preference for quieter beaches or a dislike of dog restrictions
• The nature of some beaches mean they cannot achieve Blue Flag Award status
• That it is not clear or difficult to see whether or not beaches have a Blue Flag Award

Almost a third (29.12%) of respondents answered ‘yes’ did so on the basis of positive comments, with many mentioning water quality, cleanliness, safety, facilities and standards being met. Some said that the award gave them ‘comfort’, ‘confidence’ and reassurance’ while others went on to say that losing the award would make them think twice before visiting or swimming there.

A minority (only 2.1%) of respondents answered ‘yes’ with negative comments and most of these were due to dog restrictions.

Therefore, despite figures which suggest that the Blue Flag Award holds little influence, less than 10% of those who provided more information reacted negatively to the award and many of the less favourable comments of related to how they considered it to make the beach more attractive for other visitors. In
fact, over half of the comments provided indicated that the Blue Flag Award was an element of their decision making, and a further third were neutral.

Understanding of the Blue Flag Award

This was an open question, and responses have been categorised as follows:

- **Access**
- **Clean & safe beach/sea** – comments relating to these have been combined into one category as they are related and respondents sometimes either didn’t differentiate between these multiple elements or just said clean, for example, without saying whether they were referring to the beach or the water quality.
- **Dog restrictions**
- **Facilities** – toilets and parking was commonly mentioned. Bins were another example.
- **Information**
- **Lifeguards** – included ‘wardens’ and ‘patrols’.
- **Quality/Standard** – included reference to ‘good’ and ‘best’ beaches as well as words such as ‘excellence’ and ‘criteria’.
- **Uncategorised**

The vast majority of respondents (90.1%) thought that the Blue Flag Award stood for clean and safe beaches/water. These indicated a combination of comments around cleanliness, safety and water quality (which was difficult to separate).

This figure is very high, considering that facilities, the second highest category, is mentioned by just 15.6%. All other categories were mentioned by under 10% of respondents, the highest of these being quality/standard, which was mentioned by 7.8% of people.

This reflects some of the Blue Flag criteria but does not highlight the full breadth and scale of the standard which is required to achieve the Blue Flag status. There is more work to be done by local authorities, beach managers and other organisations to highlight the full set of criteria.

“A clean well-maintained beach that has good water quality standard”
“That the cleanliness of the seawater reaches a European wide standard, that the beaches are safe, e.g. dog restrictions/dog fouling. Access for wheelchairs.”

“I expect a Blue flag beach to be clean, have signs up with information about the beach, have bins”

“The beach is looked after in the sense it is environmentally sound, water quality etc. It has amenities for us to use, toilets etc and it’s safe for us, clean, tidy, life guards ??”

“The Environmental excellence of the beach”

“If the beach has been awarded blue flag status, it means the bathing waters are kept to a high standard, keeping them clean and avoiding any pollution incidents.”

“Consistent standards of management, with environmental standards applied”
“Good water quality, lifeguards, toilets, access for all, facilities”

“An award for taking care of the environment, wildlife and cleanliness of the water and land.”

“Stands for clean and safe for all. However, if too vigorous cleaning is done this gets rid of essential habitat for certain creatures.”

“It’s a gold standard for the best beaches”

In order to try to get a fuller picture of the public’s understanding of the award, we asked if they could name (or guess) at three criteria which have to be met for the standard. This was an open question with no pre-set choices.

They have been categorised as follows:

- **Access**
- **Beauty**
- **Clean/Safe** – as above, and for the same reasons as described above, comments around the safety and cleanliness of the beach and water have been grouped together. Many comments included words related to the water, such as ‘purity, ‘pollution free’, ‘no sewage’, ‘no discharge into the sea’, ‘uncontaminated’ and ‘water bacteria levels’. Some also specifically mentioned the lack of or no litter and dog fouling.
- **Dog Restrictions**
- **Don’t Know**
- **Facilities** – as above. Toilets was mentioned commonly in this category.
- **Information** – included reference to ‘signage’, ‘board’, ‘notice’ and ‘education’ as well as some more specific responses such as ‘map’, ‘code of conduct’, ‘water quality’ and ‘tide times’.
- **Lifeguards**
- **Wildlife** – included reference to ‘sea life’, ‘habitats’ and ‘biodiversity’ as well as human involvement in its safeguarding such as ‘conservation’ and ‘protection’.
- **Uncategorised**
Similar to the previous choices, the above graph shows that the vast majority (92.9%) of responses to this question thought that the Blue Flag Award criteria involved safety or cleanliness of the beach or sea (and again, many of these described only these and therefore considered these to be all 3 criteria).

Once again, facilities was the second most common response, but this time this was mentioned by over a quarter of respondents (26.3%). At 18.5%, lifeguards was also a common answer. Access and dog restrictions were both mentioned by around 10%, with around 5% making reference to information or stating that they didn’t know. Figures for wildlife (3.8%) and beauty (0.9%) were the lowest indicated.

**Impact of the Blue Flag Award**

When asked whether the loss of the Blue Flag Award would change their perception of the beach, most respondents indicated that it would, with an additional 36% saying that it might. Only 22.7% said that their perception of the beach would not change with the loss of a Blue Flag Award.

Of the 271 people who provided further comments to explain their answers:

- Almost a third (28.8%) said yes and did so on the basis that the beach would be less clean or safe (and included those who said they would not wish to swim) and a further 13.3% mentioned again the issue of cleanliness and safety.
- 23% indicated general positive comments linked to the Blue Flag Award. These included comments which said that they’d think that something had deteriorated, that something negative had happened or that standards had dropped, those who said that it would make the beach less attractive and desirable, and those who said that this would be disappointing and would make them worry about going there.
- A third said their perceptions might change but with many of these saying it depended on the reason why the Blue Flag Award was lost with many stating that being clean and safe would be more important than other factors such as facilities. Many in this category would be concerned about water quality and swimming.

“Depends on reason, and what I wanted to use the beach for.”

“I would be concerned about health hazards”
“Loss of cleanliness or water quality would stop me visiting, loss of facilities or people management would not.”

“Would want to find out if sea polluted before swimming”

“I would feel very let down. Have used the beach for almost 40 years.”

“At least I can walk my dog in peace”

“I would want to work to get the beach back to blue flag status.”

“If it’s a beach I know well I know it offers what I want regardless”

“I would be interested to know why however it’s often to do with funding available to local councils and so it may not be anything to do with e.g. standard of water quality”

“I think there are other awards that may still be relevant”

“It would be less desirable to me”

“Water quality is important to me, but other than that I like my beaches more wild.”

“Things like dog mess or horse droppings are offensive on a swimming beach”

- 17.3% said their perception would not change and reasons for this included that they knew or liked the beach, that other factors were important (such as remote/wild or wildlife), that it may be that councils could no longer afford the award or comments around water sampling.
- Only 1.9% of respondents made negative comments about the Blue Flag Award, which was mainly due to dog restrictions and increased visitors (and subsequent litter)
- A small number of respondents mentioned that it made no difference one way or another (3.0%) and noted the importance of walking their dog (1.9%) and/or the beach being local (1.5%).

If you heard that a beach no longer had a Blue Flag Award, would that change your perception of the beach?

When asked whether the loss of the Blue Flag Award would affect somebody’s decision directly to visit the beach, 45.0% said that it might and a further 16.4% said that it would. Just over a third (35.5%) said that it wouldn’t affect their decision, while a minority (3.2%) didn’t know.

Other comments from the survey

A total of 189 people provided additional comments. These were categorised as follows:
Positive about the Blue Flag Award – many were very supportive of the award, with comments including that it’s an ‘achievement to be proud of’, an ‘incentive’, a sign of ‘good standards’ and a ‘recognition of quality’ (with cleaner, safer and quality of life being mentioned). Others mentioned that the award helped to draw visitors (some said it needed to be publicised better) while others mentioned tourism and income benefits.

“Strong brand for tourism in Wales”

“For a beach to be awarded the blue flag is an achievement to be proud of”

“It would be good to widen the focus to include care of the marine environment as well as the beach itself.”

“Anything that moves towards making beaches cleaner and safer should be supported by central and local governments as they are so important for quality of life for residents near and far and for tourism.”

“For me, the Green Coast Award is just as important, as the Blue Flag beaches tend to be the busiest ones with lots of infrastructure which don’t appeal to me as much as the wilder sections of coast.”

“Only the fact that I think people really try to look after our local beaches and they are mainly volunteers. All the local dog walkers I see in my area are very careful to clear up their dog mess.”

“It’s annoying dogs get banned from certain beaches when humans leave behind rubbish, cigarette butts, soiled nappies, etc”

“More publicity needed about Blue Flag, especially for people not living near a beach.”

“I think all blue flag beaches should ban dogs then we wouldn’t have to worry of overheated dogs and dog mess”

“If I had the grandchildren with me I would prefer a Blue Flag beach”

“I am now aware that I am not sure what all the criteria are to be a Blue Flag beach – I will have to do some research”

“We need to take more pride in our beaches in Wales. The access to the sea was a key factor in me moving here and it shames me to see the mess left by visitors, including locals.”

“Interesting questions, really made me think about the reason blue flags are important to beaches in the UK and abroad!”

“I’m happy that the Blue Flag exists but dubious about its standards being upheld. As a year-round beach goer, I see littering, marine litter and poor water quality at various times throughout the year”

“Blue Flag and the Coast Awards are so important to our local economy and this needs to be recognised.”

“If everyone disposed of their litter more thoughtfully, our beaches would be much cleaner, marine life more protected and they would attract more tourism.”
• **Negative about the Blue Flag Award**— only two responses were negative about the award, one which stated we should aim for higher water quality and the other was doubtful of the standard due to litter and water quality levels observed.

• **Positive in general**— these included those who were pleased to see the survey being undertaken.

• **Other Coastal Awards**— most of these mentioned the Green Coast Award, although there were a couple of references to the Seaside Award.

• **Dogs**— including those who are for and against dogs being allowed on beaches, comments on responsible and irresponsible dog owners, dog bins and making rules about dogs on beaches clearer.

• **Environment**— included comments about the importance of the coastal environment, observations on beach quality and beach users’ behaviour (good and bad) and suggested solutions (such as bins, enforcement and messaging).

• **More information**— these comments fell into two categories. First there were those who wanted more information about the survey— why it was being done and those who wanted feedback or requested to see the results. Secondly were those who wanted to know more about the Blue Flag Award and those who felt increased awareness, publicity and education about the awards would be beneficial.

• **Uncategorised**— most of these simply said ‘no’ or ‘none’. Some gave feedback on the survey (e.g. the questions seemed repetitive. A small number said they didn’t visit beaches much.

It is worth noting that some comments mentioned related concerns around coastal and environmental management the current political climate e.g. austerity and fears of what would happen post-Brexit.
Business perceptions of the Blue Flag Award

As well as the visitor focused survey, a smaller, focused survey was carried out with businesses who operated on or near to a Blue Flag Beach. The respondents represented a diverse range of sectors from hotels to micro-breweries. Businesses showed a slightly higher level of awareness of the Blue Flag criteria than our general visitor survey and particularly emphasised the water quality and visitor facility aspects.

- 82% of businesses said that they thought the award helped to bring more visitors to the area
- 60% of businesses indicated that the blue flag award had had a positive impact on their business

Business perceptions of the Blue Flag Award – Survey results

Who responded to our survey

Business Type

Over 40% of businesses indicated the ‘other’ category. Within these responses, 40% indicated that they represented some form of accommodation such as self-catering cottages or pubs with rooms. Others included artisan food producers, micro-breweries, utility broker and community journalists.

The majority of these businesses indicated that they operated primarily as a sole or independent trader with premises. 30% operated as a partnership and a further 14% operated as a private limited company. Cooperatives, public limited companies and independent traders without premises were also represented.

97% of the respondents indicated that they knew of the Blue Flag Award and 80% indicated that they were aware that their closest beach to where they operate from has the Award.

58% of businesses said that they promote the Blue Flag Award information from their business and many indicated that they have this information on their website and will often tell guests about it verbally.
Although some indicated that they didn’t think it was relevant for their business or that they hadn’t thought about it specifically. Many businesses made a point of highlighting the award to their customers.

“We stress the cleanliness of the water”

“We highlight the fact we are 100metres from a Blue Flagged Beach”

“On arrival all guests are informed that we have lots of blue flag beaches and I point out the nearest ones”

“It’s in the information pack we leave for guests - especially in relation to seasonal dog ban”

“Information via website, social media and correspondence”

"We point that out to our punters on field excursions if it has a flag”

**Understanding of the Blue Flag Award**

88% of business respondents indicated they believed the Blue Flag Award stood for clean beaches and clean water. When asked to name 3 criteria, many of the businesses (more so than in our visitor survey) indicated water quality and visitor services. A few respondents also mentioned environmental education and the presence of an attendant. This is a positive finding and the broader awareness may reflect the fact that they are in a position of ‘selling’, rather than visiting the area and may be more likely to be engaged in the blue flag award process.

**Do you think that the Blue Flag award helps to attract visitors to this spot/town/location in particular?**

![Bar chart showing the percentage of businesses who think the Blue Flag award helps to attract visitors to their location.](chart)

Significantly, over 82% of businesses said that they believed that the Blue Flag Awards helps to attract visitors to their location. Furthermore, 60% said that it had had a positive impact on their business and although a couple of respondents indicated that they hadn’t yet had the chance to promote it yet or that it wasn’t relevant to them at the moment. The comments on the question on impact was overwhelmingly positive.

“Low level background consciousness...underpinning choice of this county as a destination for beach activities”

“No one has ever mentioned it. Though many guests do like to bathe or surf on local beaches”

“Guests have never said whether it has affected their bookings, but they do love Amroth beach”
“Tourists are attracted by a safe, clean beach where swimming is safe”

“The Blue Flag Awards are well recognised, and we feel that this has a beneficial effect on both our business and Saundersfoot in general”

“Bay View - the larger of our two properties, is very much geared towards families. It’s important for parents to know that the water their children are swimming is of good quality. The life guards and flags denoting safe areas to swim also gives families confidence to enjoy the sea”

“Clean beaches are important to those with children”

“Our customers comment on the blue flag quality therefore helps our tourism and bookings in the area”

“We trade on the purity of our product which is made from sea water”

Other comments

Of the respondents who chose to leave additional comments, 100% of these were positive in regard to the Blue Flag Award (excluding just the 5 responses who said ‘No other comments’).

These included:

“‘It’s a quality mark that is recognised also in Europe which is important when trying to attract overseas visitors”

“I like it and am proud when my local beaches gain this award”

“Please keep it going. I would welcome closer ties with local businesses to help us ensure that we retain Blue Flag status and to help us improve and promote us to a wider audience.”

“I think it’s a mark of quality that everybody recognises in the UK. It’s reassuring for families particularly when their young children are swimming in the water.”

“It is a great thing for the confidence of visitors, a great marketing tool for the county and businesses, and a great incentive for councils to up their game if the result is less than they hoped for!”
## Appendix 1 - Award Winning Beaches in Wales 2017

### Blue Flag Beaches 2017

<table>
<thead>
<tr>
<th>Beach Name</th>
<th>Beach Name</th>
<th>Beach Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aberdaron Beach</td>
<td>Langland Bay</td>
<td>Pwllheli</td>
</tr>
<tr>
<td>Abersoch</td>
<td>Llanddona</td>
<td>Rest Bay Porthcawl</td>
</tr>
<tr>
<td>Amroth</td>
<td>Llandudwy Beach</td>
<td>Saundersfoot</td>
</tr>
<tr>
<td>Barmouth</td>
<td>Llanfawrfechan</td>
<td>South Tenby</td>
</tr>
<tr>
<td>Benllech</td>
<td>Llangrannog</td>
<td>Treaundur Bay</td>
</tr>
<tr>
<td>Borth</td>
<td>Lydstep</td>
<td>Trecco Bay Porthcawl</td>
</tr>
<tr>
<td>Bracelet Bay</td>
<td>Morfa Bychan - Black Rock Sands</td>
<td>Tresaith</td>
</tr>
<tr>
<td>Broadhaven</td>
<td>New Quay - Harbour Beach</td>
<td>Tywyn</td>
</tr>
<tr>
<td>Castle Beach Tenby</td>
<td>Newgale Sands</td>
<td>Whitesands</td>
</tr>
<tr>
<td>Caswell Bay</td>
<td>North Aberystwyth</td>
<td>Whitmore Bay (Barry)</td>
</tr>
<tr>
<td>Church Bay</td>
<td>North Tenby</td>
<td></td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Pembrey Beach - Llanelli</td>
<td></td>
</tr>
<tr>
<td>Coppet Hall</td>
<td>Poppit Sands - West</td>
<td></td>
</tr>
<tr>
<td>Criccieth</td>
<td>Port Eynon</td>
<td></td>
</tr>
<tr>
<td>Dale</td>
<td>Porth Dafarch</td>
<td></td>
</tr>
<tr>
<td>Dinas Dinlle</td>
<td>Prestatyn Central</td>
<td></td>
</tr>
</tbody>
</table>

### Blue Flag Marinas / Tour Boat Operators 2017

<table>
<thead>
<tr>
<th>Marina Name</th>
<th>Marina Name</th>
<th>Marina Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Swansea Marina</td>
<td>Porthcawl Marina</td>
<td>Penarth Marina</td>
</tr>
<tr>
<td>Rib Ride</td>
<td>Blue Ocean Adventures</td>
<td></td>
</tr>
</tbody>
</table>

### Seaside Awards 2017

<table>
<thead>
<tr>
<th>Award Name</th>
<th>Award Name</th>
<th>Award Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goodwick</td>
<td>Pendine</td>
<td>Silver Bay, Rhoscolyn</td>
</tr>
<tr>
<td>Aberystwyth South</td>
<td>Newport</td>
<td>Southerndown</td>
</tr>
<tr>
<td>Aberavon</td>
<td>Llandudno N Shore</td>
<td>St Davids's Red Wharf Bay</td>
</tr>
<tr>
<td>Abergele Pensarn</td>
<td>Little Haven</td>
<td>Traeth Cregyll</td>
</tr>
<tr>
<td>Clarach</td>
<td>Porth Eilian</td>
<td>Traeth y Dolau</td>
</tr>
<tr>
<td>Beaumaris</td>
<td>Nolton Haven</td>
<td>Wisemans Bridge</td>
</tr>
<tr>
<td>Cold Knap</td>
<td>Point of Ayre , Talacre</td>
<td></td>
</tr>
<tr>
<td>Jacksons Bay</td>
<td>Sandy Haven</td>
<td></td>
</tr>
</tbody>
</table>

### Green Coast Award 2017

<table>
<thead>
<tr>
<th>Award Name</th>
<th>Award Name</th>
<th>Award Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abereriddy</td>
<td>Freshwater East</td>
<td>Mwnt</td>
</tr>
<tr>
<td>Abererch, Glan Don</td>
<td>Harlech</td>
<td>Penally</td>
</tr>
<tr>
<td>Barafundle</td>
<td>Kimmel Bay</td>
<td>Penbryn</td>
</tr>
<tr>
<td>Broad Haven South</td>
<td>Llandanwg</td>
<td>Porth Neigwl</td>
</tr>
<tr>
<td>Caerfai</td>
<td>Llanrhystud</td>
<td>Priory Bay, Caldey</td>
</tr>
<tr>
<td>Cilborth</td>
<td>Manorbier</td>
<td>West Angle Bay</td>
</tr>
<tr>
<td>Cwm yr Eglwys</td>
<td>Marine Lake</td>
<td>West Dale</td>
</tr>
<tr>
<td>Druidstone</td>
<td>Marloes</td>
<td></td>
</tr>
<tr>
<td>Fairbourne</td>
<td>Martins Haven</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 2 – Survey Questions (Public)

This is a transcript of the survey which was developed for the SurveyMonkey platform.

Blue Flag Public Perception survey 2017 / Arolwg Canfyddiad y Faner Las 2017

This survey is on the subject of Blue Flag Award for beaches. It should take 10-15 minutes to complete. / Pwnc yr arolwg hwn ydy Gwobr y Faner Las ar gyfer traethau. Dylai gymryd 10-15 munud i’w gwbhau.

<table>
<thead>
<tr>
<th>Your Location: / Eich Lleoliad:</th>
<th>Not in Wales? Please specify: / Y tu allan i Gymru? Nodwch ble isod:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age: / Oedran:</td>
<td>M/F: / Gwryw/Benyw:</td>
</tr>
</tbody>
</table>

1. Thinking of your favourite beach to visit, would you normally: / Gan feddwl am eich hoff draeth i ymweld â fe, fyddech chi fel arfer yn:
   - Go on a day trip / Mynd ar drip diwrnod
   - Go on holiday to the area / Mynd ar wyliau i’r ardal
   - N/A – I live close to a beach / Ddim yn berthnasol – Rwy’n byw’n agos at draeth
   - N/A – I don’t visit beaches / Ddim yn berthnasol – Dydw i ddim yn ymweld â thraethau
   (Go to Q3) (Ewch i gwestiwn 3)

2. What do you like about that beach in particular? / Beth ydych chi’n ei hoffi am y traeth yna’n benodol?
   - Clean / Mae’n lân
   - Safe / Mae’n ddiogel
   - Parking is easy / Mae parcio’n hawdd
   - Convenient location for other areas of interest / Mae e mewn lleoliad cyfleus i ardaloedd eraill o ddidgordeb
   - Wildlife / Y bywyd gwyllt
   - Lifeguards are present / Mae achubwyr bywyd yn bresennol
   - Good for watersports / Mae’n dda am chwaraeon dŵr
   - Access to walking routes / Mae yna fynediad i deithiau cerdded
   - Other – Please specify: / Arall – Nodwch os gwelwch yn dda:

3. Have you heard of the Blue Flag Award? / Ydych chi wedi clwyd am Wobr y Faner Las?
   - Yes / Do
   - No / Naddo  (Go to Q7) (Ewch i gwestiwn 7)

3. Do you think that the Blue Flag Award is: / Ydych chi’n meddwl bod Gwobr y Faner Las:
   - Just in the UK / Yn y DU yn unig
   - Just in Europe / Yn Ewrop yn unig
   - International / Yn rhinyglwladol
   - Don’t Know / Ddim yn gwybod

4. Do you know if your favourite beach has the Blue Flag Award? / Ydych chi’n gwybod os oes gan eich hoff draeth Wobr y Faner Las?
   - Yes it does / Os mae ganddo
   - No it doesn’t / Na does dim ganddo  (Go to Q7) (Ewch i gwestiwn 7)
   - Don’t know / Ddim yn gwybod  (Go to Q7) (Ewch i gwestiwn 7)
5. Does the Blue Flag Award affect your decision to go to this beach in particular? If so, why? / Ydy Gwobr y Faner Las yn effeithio ar eich penderfyniad i fynd i’r traeth yma’n benodol? Os felly, pam?
   Yes / Ydy
   No / Nac ydy
   Please explain your answer / Eglurwch eich ateb os gwelwch yn dda

6. Does it affect your decision when going on holiday in the UK or abroad? / Ydy hi’n effeithio ar eich penderfyniad pan ewch chi ar wyliau yn y DU neu dramor?
   Yes - in the UK / Ydy - yn y DU
   Yes - abroad / Ydy - dramor
   Yes - both abroad and in the UK / Ydy – dramor ac yn y DU
   No - It doesn’t affect my decision at home or abroad / Nac ydy – dydy hi ddim yn effeithio ar fy mhenderfyniad adre neu dramor

7. In your view, what does a Blue Flag Award beach stand for? OR If you’re not aware of the award, what do you think it stands for? / Yn eich barn chi, am beth mae Gwobr y Faner Las yn sefyll? NEU Os nad ydych chi’n ymwybodol o’r wobr, beth ydych chi’n meddwl ei bod yn sefyll amdano?

8. Can you name (OR guess) 3 criteria that a beach needs to meet to be eligible for the Blue Flag Award? / Gallwch chi enwi (NEU ddyfalu) 3 o feini prawf sydd angen eu cyrraedd er mwyn bod yn gymwys am Wobr y Faner Las?
   1.
   2.
   3.

9. If you heard that a beach no longer had a Blue Flag Award, would that change your perception of the beach? / Os fydech yn clywed nad oedd gan draeth Wobr y Faner Las bellach, fyddai hynny’n newid eich canfyddiad o’r traeth?
   Yes / Byddai
   No / Na fyddai
   Please explain your answer / Eglurwch eich ateb os gwelwch yn dda

10. Would it affect your decision to visit the beach? / Byddai hyn yn effeithio ar eich penderfyniad i ymweld â’r traeth?
    Yes / Byddai
    No / Na fyddai
    Possibly / Efallai
    Don’t know / Ddim yn gwybod

11. Do you have any other comments on the subject of this survey? / Oes gennych chi unrhyw sylwadau eraill ar bwc yr arolwg hwn?

Thank you for taking part in this survey. If you’d like to find out more about our work or contact us, please visit: www.keepwalestidy.cymru / Diolch am gymryd rhan yn yr arolwg hwn. Os hoffech chi ddarganfod mwy am ein gwaith neu gysylltu â ni, ewch i: www.keepwalestidy.cymru os gwelwch yn dda
References


2 Ibid

3 Ibid


5 FEE (2008), *Op cit*

