

NSW Marine Estate
Community Wellbeing Survey

Coastal Visitors of NSW
Summary Report (*Wave 1*)



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Cover location: Cape Byron, Byron Bay

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Introduction

The New South Wales coastal and marine environment (the marine estate) are collectively one of our greatest natural assets and are central to our social, ecological, cultural, and economic identity and wellbeing.

Our marine estate is a single continuous ecosystem that includes oceans, estuaries, coastal wetlands and the coastline itself that requires active and engaged management.

In 2018, the NSW Government established a vision for the NSW coast. This vision is for:

“a healthy coast and sea, managed for the greatest wellbeing of the community, now and into the future.”

To realise this vision, we are striving for better outcomes for the community, industry and the environment through improved planning and coordination.

This includes a new evidence-based approach to management allowing us to respond to threats and risks in a timely and transparent way.

It also recognises that the views of the community and visitors to the coast are critical to improving the way we all work collaboratively to manage, protect and enhance the NSW marine estate for residents, visitors and for future generations.

The Marine Estate Management Strategy outlines the vision and priorities for management of the marine estate. Progress towards implementing the Marine Estate Management Strategy and delivering the vision is being measured and reported on through the Marine Integrated Monitoring Program.

The primary purposes of the Marine Integrated Monitoring Program are to:

- a) monitor the condition and trend of environmental assets and community benefits.
- b) evaluate the effectiveness of management initiatives and actions that aim to reduce priority threats and risks.
- c) fill knowledge gaps that were identified as part of the statewide Threat and Risk Assessment process.

This report is a critical step in achieving these purposes and is a key deliverable for initiative 8 under the Marine Estate Management Strategy – to improve the social, cultural and economic benefits that the community derives from the marine estate.

The key objectives of this research were as follows:

- Develop a methodology to collect long-term data for NSW Coastal Visitors that allows for robust analysis of spatial and temporal trends in community wellbeing
- Collect baseline data for Coastal Visitors on benefits and threats to these benefits to compare with future survey waves
- Collect baseline data against a suite of relevant outcome indicators identified in the NSW Marine Estate Integrated Monitoring and Evaluation Framework
- Fill key social knowledge gaps identified in the statewide Threat and Risk Assessment

The report summarises survey results aligned with priority indicators and measures of the values of visitors to the NSW coast relating to the benefits, threats, impacts and management of the marine estate.

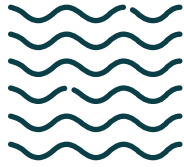
What is the marine estate?

The marine estate is one of the most significant natural resources in NSW. It includes around one million hectares of estuary and ocean, with:



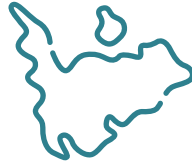
more than
1,750

kilometres of
ocean coastline



6,500

kilometres of
estuarine and coastal
lakes foreshores



44

offshore
islands



826

beaches



185

estuaries and
coastal lakes

It offers countless opportunities for the community to socialise with friends and family as well as a chance to engage with the natural world. Experiences in, and associations with, the marine estate through the generations has established a contemporary coastal and marine culture that crosses many sectors. For example, a surfing culture in NSW is well recognised and is an iconic activity important to a broad range of communities and visitors. Similarly, commercial and recreational fishing have a long history in NSW, with associated social and community values (tangible and intangible) established through shared experiences, knowledge generation and a connection to nature.



Location: Redhead Beach, Redhead.

How is the marine estate used?

The coast is a central part of Australia's heritage and culture and is afforded significant value, even by those who don't visit it often.

The marine estate is a popular destination for visitors from within and outside of NSW. Uses of the marine estate vary considerably, reflecting the diversity of environmental assets and locations across NSW. Common uses include (but are not limited to):

- ocean swimming/bathing
- surfing and water sports
- passive beach and foreshore-based recreation
- recreational fishing
- visiting cafes and shops
- sightseeing
- engaging and interacting with the natural environment
- as a place for cultural engagement and participation
- as a meeting place for social interactions.

Why is the marine estate important?

International research on coastal environments has consistently confirmed the importance of coastal environments to the social and economic wellbeing of communities and visitors to the coast. Such benefits include:

- improved mental health including reduced stress, increased mindfulness
- reduced rates of social isolation and increased community participation
- improved levels of physical activity through recreation
- reinforced sense of personal identity.

The extent and significance of these benefits is, however, dependent on maintaining the quality of the marine estate environment in the long-term.



Survey of NSW Coastal Visitors

The need for a community wellbeing survey

Historically, there has been no systematic monitoring of the social, cultural and economic (or human) attributes of the NSW marine estate. Such monitoring is essential to realising the vision of the Marine Estate Management Strategy (and associated Marine Integrated Monitoring Program) and ensuring the priority threats and risks facing the NSW coast are addressed.

This report summarises the findings of the full survey report (*Wave 1 2021*) prepared by NSW Department of Primary Industries (DPI) and Ipsos. The full report includes further details on the results on visitor type and sub-group (including age and Culturally and Linguistically Diverse) analysis.

Survey approach

The survey conducted by Ipsos used online panelling and sampling design to ensure the integrity and reliability of the data. This included regional quotas and demographic baseline questions to ensure the results of the survey are representative of the NSW coastal visitors population.

Visitors are defined as either:

- non-coastal NSW residents (i.e. must live further than 5km from the NSW coast) or
- visitors from other states

All respondents were over the age of 18 at the time of the survey.

The survey provides information to track visitor perceptions and values as to benefits and impacts of the NSW marine estate. The design of the survey allows for long-term monitoring by repeating the survey periodically. The questions and responses have been specifically designed to accurately reflect community experiences over the past 12 months and allow for priority indicators to be tracked over time in a user-friendly and consistent manner.

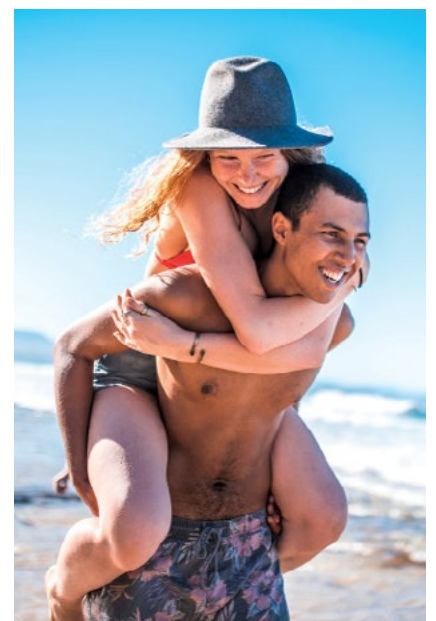


A total of 1,146 responses were recorded for Visitors to the NSW Coast.

Key questions

The survey questionnaire captured a range of indicators and data sets on a variety of topics and themes relating to the marine estate. These included:

- Age and demographics
- Locations and regions
- Visitor use of the NSW marine estate
- Contribution of the NSW marine estate to quality of life
- Visitor connections to the NSW marine estate
- Visitor awareness of benefits and threats to the marine estate
- Visitor perceptions of environmental health
- Visitor stewardship of the marine estate
- Impacts of key threats on visitor experience of the NSW marine estate
- Importance of managing different aspects of the NSW marine estate
- Awareness and perception of marine estate management



NSW coastal regions

For the purpose of the survey, the NSW Coast is broken into 7 discrete coastal regions:



“Great scenery. It’s refreshing to reset from the hustle and bustle of concrete jungle city life. Just staring out into nature, or eating by the coast, really puts life into perspective and is calming.”



Location: Bondi Beach, Sydney.

Scorecard - results

This snapshot summarises the indicators and statewide average scores given by survey respondents to the key questions in the Coastal Visitors¹ Survey 2021.

Question/Indicator	Percentage or Average Score
Visitor use of the NSW marine estate	
How often do you visit the NSW coast?	56% at least 3-6 times per year
Top 5 activities undertaken when visiting the NSW coast:	
• Picnicking, sightseeing, visiting coastal cafes	61% of visitors
• Beach going	60% of visitors
• Land-based exercise	48% of visitors
• Water sports	35% of visitors
• Wildlife or nature watching	34% of visitors
Visitor perceptions of environmental health	
How would you rate the current health of the natural coastal environment on the NSW coast?	Very good 18% Good 57% Poor 7% Very Poor 1%
Top reasons for positive rating of health of the natural coastal environment:	
• Clear / clean environment	22% of visitors
• Local council / government bodies very proactive / regulations in place	19% of visitors
• No rubbish / no litter / tidy / plenty of bins provided / less pollution	16% of visitors
Top reasons for negative rating of health of the natural coastal environment:	
• Rubbish / littering still happens / some leave rubbish behind	40% of visitors
• Polluted water / pollution is an issue	31% of visitors
• Some tourists or visitors ignore regulations	22% of visitors
Contribution of the NSW marine estate to quality of life	
Top benefits of the NSW Coast of which Coastal Visitors have detailed awareness:	
• Spending time in the natural environments has been linked to better health and overall wellbeing	50% of visitors
• Recreational fishing provides wellbeing benefits	39% of visitors
• For Aboriginal people, culture, nature, land and water are connected to each other	36% of visitors
• Estuaries in NSW are important nursery areas for many species	36% of visitors
How important is the NSW coast in contributing to your quality of life? ²	7.4/10
Top 3 contributors to Visitors quality of life:	
• Relaxing / calming / peaceful	24% of visitors
• Holidays / leisure / nice place to visit	23% of visitors
• Beach / nice ocean / beautiful beaches / going to the beach	20% of visitors

¹ Coastal visitors defined as at least 18 years old, reside in non-coastal region or visited at least one of the seven NSW coastal regions

² 0 = Not important at all --> 5 = Neutral --> 10 = Very important

Question/Indicator	Percentage or Average Score
How important is the NSW coast in contributing to the following aspects of your life? ³	
• Emotional and mental health	7.3/10
• Spending time / socialising with family and friends	7.3/10
• Physical health	6.9/10
• Nutritional needs	6.2/10
How much do you agree with the following statements? ⁴	
• I feel a personal connection to the NSW coast	6.7/10
• The NSW coast is part of my identity	6.0/10
Threats and impacts to the NSW coast	
How safe do you feel when using the NSW Coast? ⁵	
7.7/10	
Top threats associated with the NSW coast of which Coastal Visitors have detailed awareness:	
• Marine litter can injure and kill wildlife through ingestion or entanglement	64% of visitors
• Most marine litter comes from land sources	50% of visitors
• Human presence can impact wildlife by causing them to move away from feeding, resting and breeding areas	49% of visitors
• Nutrients and sediments that are washed into drains and creeks can end up in waterways	49% of visitors
How much of an impact do you think the following aspects currently have on your experience of the NSW coast in the past 12 months? ⁶	
• Litter on shorelines or in the water	6.3/10
• Overcrowding	6.0/10
• Illegal behaviour or activities	5.9/10
• Climate change	5.7/10
• Decline in wildlife to appreciate	5.7/10
Visitor stewardship of the NSW marine estate	
Top reasons why it is important to manage different aspects of the coast? ⁷	
• Pass on a healthy NSW coast to future generations	8.6/10
• Preserve nature –even though it may never be used or seen by humans	8.4/10
• Provide people a place where people can connect with nature	8.3/10
Do you feel responsible for helping maintain a healthy NSW Coast? ⁸	
7.2/10	
How well do you feel you understand the following rules and regulations related to the NSW coast?	
between 41% and 80% 'At least fairly well'	
Participation in environmental best practices	
Between 54% and 82% 'Always' participate	
Awareness of the Marine Estate Management Authority	
12%	
Visitor trust in the NSW Government to achieve the vision for the NSW marine estate	
89% of people 'Fairly' or 'Very Confident'	

³ 0 = Not important at all --> 5 = Neutral --> 10 = Very important

⁴ 0 = Strongly disagree --> 5 = Neutral --> 10 = Strongly agree

⁵ 0 = Strongly disagree --> 5 = Neutral --> 10 = Strongly agree

⁶ 0 = No impact, 1-3 = Minor, 4-6 = Moderate, 7-9 = Major, 10 = Severe impact

⁷ 0 = Not important at all --> 5 = Neutral --> 10 = Very important

⁸ 0 = Strongly disagree --> 5 = Neutral --> 10 = Strongly agree

Visitor use of the NSW marine estate

Frequency of visit

Coastal Visitors regularly use the NSW coast for leisure and tourism activities. Over the past 12 months, more than half (56%) of visitors visited the coast at least 3-6 times a year, with a further 30% visiting 1-2 times a year.

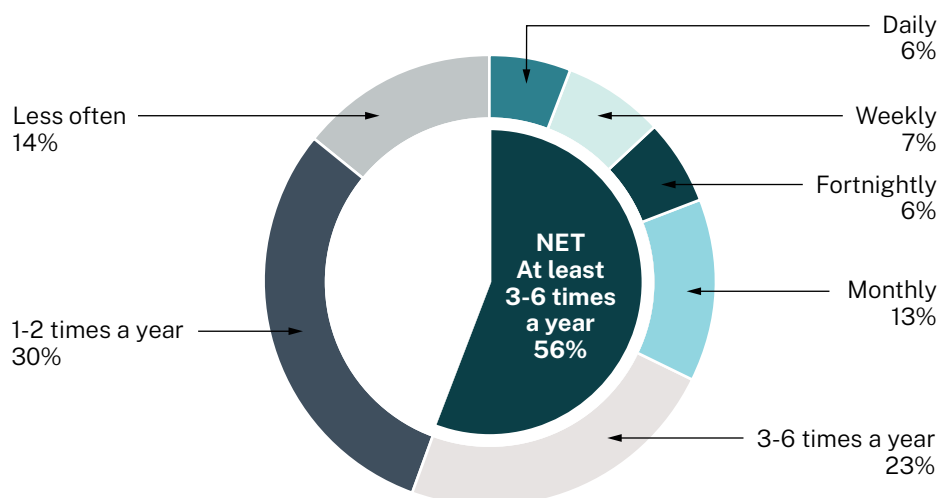


Figure 1: Frequency of visitation to the NSW coast, Coastal Visitors, 2021.

Types of activities and uses

A diverse range of coastal activities are undertaken and participated in by Coastal Visitors each year. This diversity reflects the varied nature and attributes of the NSW marine estate, including the ocean, beach, foreshore, estuary and adjoining tourism and economic activity (such as cultural sights and cafes/restaurants).

The most common activities undertaken by Coastal Visitors over the past 12 months include:

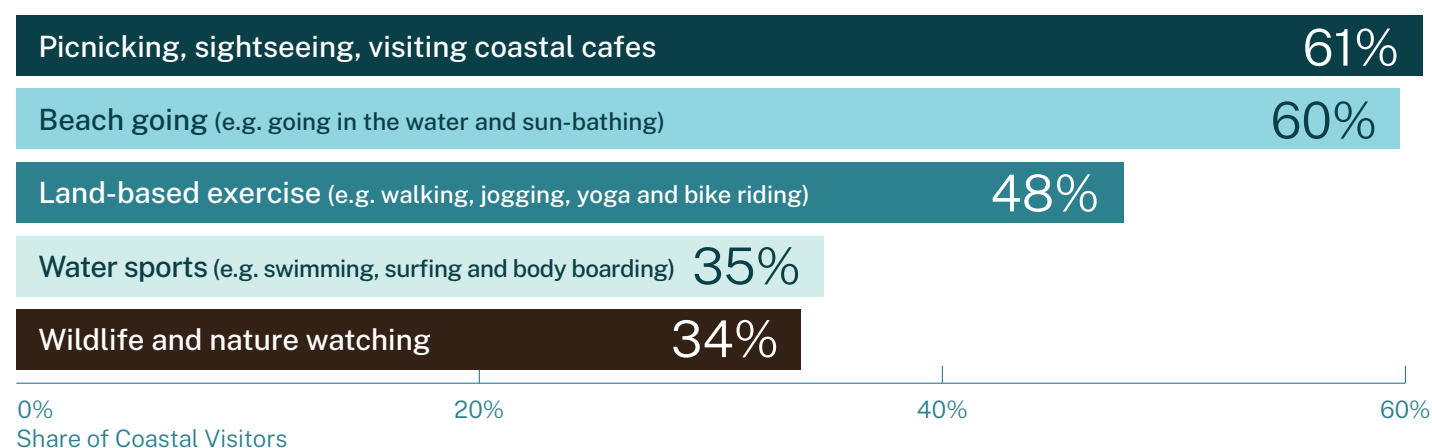


Figure 2: Activities undertaken during visits to the NSW coast, Coastal Visitors, 2021.

Other less frequent activities include:

- Recreational fishing (20%) and boating (11%)
- Paddle craft sports (11%)
- Snorkelling or SCUBA diving (9%)
- Environmental work (6%)
- Employment (3%).

Visitor perceptions of environmental health

Health of the natural environment

The health of the natural environment of the NSW marine estate is critical to realising the benefits of the coast and maximising its contribution to the quality of life of Coastal Visitors.

Overall, 75% of Coastal Visitors view the current health of the NSW marine estate natural environment as positive, with 18% perceiving it as “Very Good” and 57% viewing it as “Good”. In contrast, only a small minority (7%) of people view the current health of the NSW coastal environment as “Poor”.



Figure 3: Perceptions of the current health of the natural coastal environment of the NSW marine estate, Coastal Visitors, 2021.

The most common reasons for positive rating of the health of the natural coastal environment were:

- Clean / clean environment (22% of visitors)
- Local council / government bodies very proactive/ regulations in place (19%)
- No rubbish / no litter / tidy / plenty of bins provided / less pollution (16%) and
- Water is clean/ water is clear/ pristine water / good water quality (11%)

The most common reasons for negative rating of the health of the natural coastal environment were:

- Rubbish / littering still happens / some leave rubbish behind (40% of people)
- Polluted water / pollution is an issue (31%)
- Some tourists or visitors ignore regulations (22%) and
- Erosion / erosion taking its toll / a concern / a problem (16%)

“I think that the local council does well in taking care of our natural coastal environment as it always encourages recycling and healthy habits of picking up rubbish and taking care of our environment and plants.”

Location: The Pass, Byron Bay.

Contribution of the NSW marine estate to quality of life

Awareness of benefits

Coastal Visitors exhibited a high degree of awareness of the benefits associated with a healthy natural coastal environment.

The benefits with the highest share of Coastal Visitors “fully aware” included:

Spending time in natural environment has been linked to better health and overall wellbeing

50% are “Fully Aware”

Recreational fishing provides wellbeing benefits

39%

Estuaries in NSW are important nursery areas for many species

36%

Nature-based tourism is important for the economy of regional areas of NSW

35%

Contribution to the quality of life of Coastal Visitors

More than half (55%) of Coastal Visitors consider the NSW coast as either an “Important” or “Very Important” contributor to their quality of life (compared to only 8% that consider it of “Low importance” or “Not important at all”). This results in an overall score by Coastal Visitors of 7.4 out of 10.

Contribution importance scores are higher for visitors who are NSW residents (7.6 out of 10) compared to visitors from other states (7.0 out of 10)

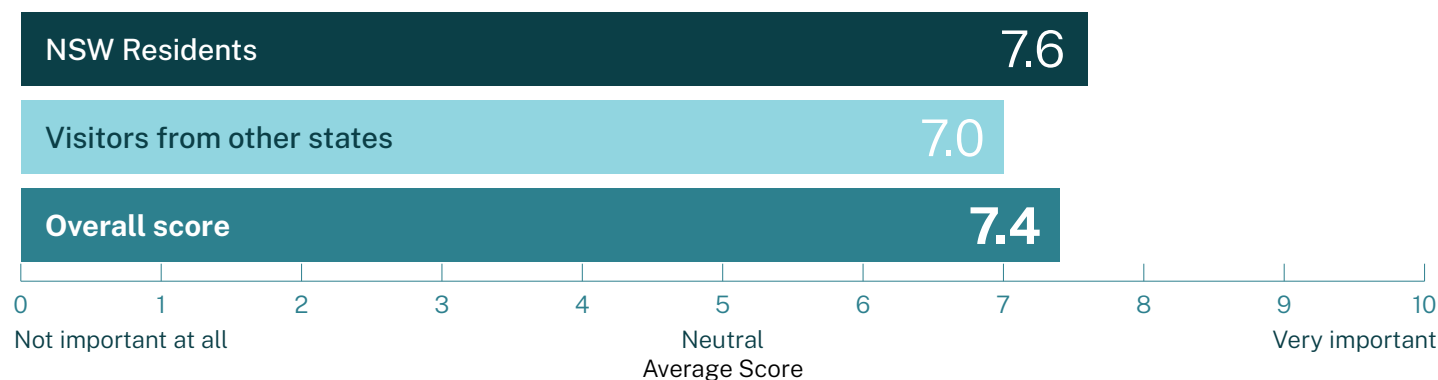


Figure 4: How important is the NSW coast to the quality of life of Coastal Visitors, average score (Out of 10), 2021.

The three most common contributing factors to positive view of the quality of life contribution of the NSW coast were:



Relaxing / calming / peaceful

24%



Holidays / leisure / nice place to visit

23%



Beach / nice ocean / beautiful beaches / going to the beach

20%

Contributions to personal health

Coastal Visitors recognised the importance of the NSW Coast to different aspects of their health.

Of the four major health contributors examined, all scored 6.2 or more out of 10 by Coastal Visitors, with more than half of visitors regarding emotional/mental health and spending time/ socialising with family and friends as either “Important” or “Very Important”.

Personal health benefits:

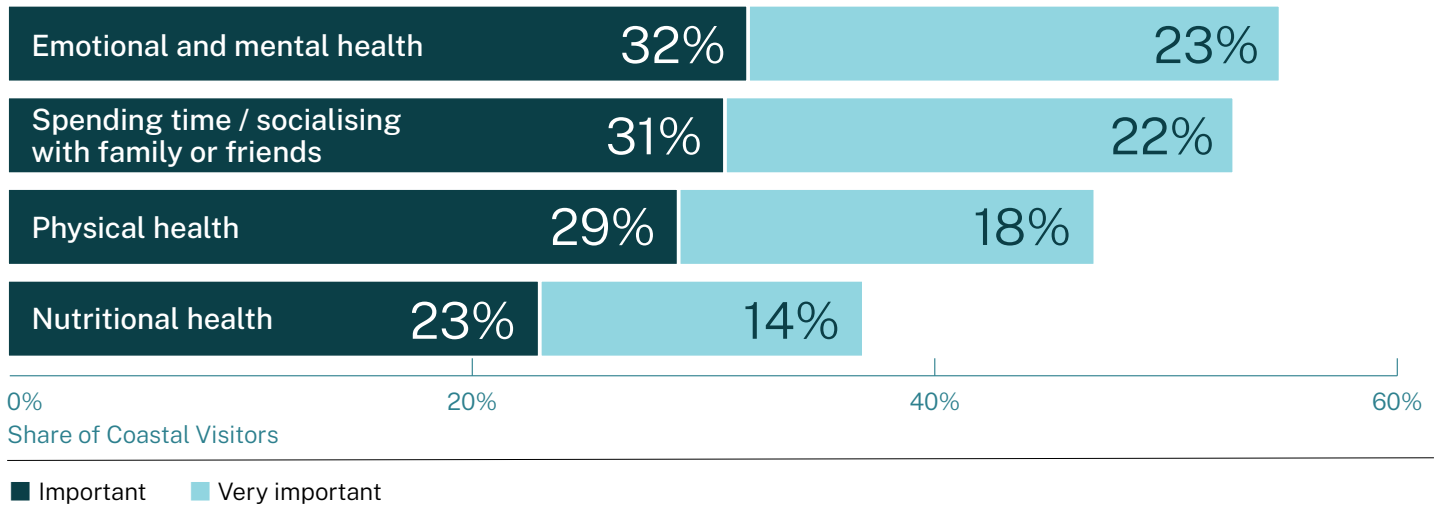


Figure 5: Share of Coast Visitors viewing the NSW Coast as “Important” or “Very Important” contributors to their personal health, by health type, 2021.

Overall, visitors who are NSW Residents scored the contribution of the NSW Coast to their personal health higher across all categories than visitors from other States.



Visitor connections to the NSW marine estate

These benefits and contributions to the quality of life and personal health appear to underpin a moderately positive connection by Coastal Visitors with the NSW coast. More than 4 in 10 Coastal Visitors either “Agreed” or “Strongly Agreed” with the statement that “I feel a personal connection to the NSW Coast”, while 34% viewed the NSW as a strong part of their personal identity.

I feel a personal connection to the NSW coast



The NSW coast is part of my identity



■ 0 = Strongly Disagree ■ 1-2 ■ 3-4 ■ 5 = Neither agree nor disagree ■ 6-7 ■ 8-9 ■ 10 = Strongly agree

Percentages may not total 100 due to rounding

Figure 6: Visitor connections to the NSW coast.

As expected, connection to the NSW coast is higher for non-coastal NSW residents (average score of 6.3-6.9 out of 10) compared to visitors from other States (5.5-6.5 out of 10).

Threats and impacts to the NSW marine estate

Personal safety

Coastal Visitors expressed positive feelings of safety when visiting the NSW coast, scoring safety 7.7 out of 10. Over six in 10 Coastal Visitors either “Agreed” or “Strongly” Agreed with the statement “I feel safe when using the NSW Coast”. Feelings of safety are broadly the same between NSW Residents (7.7) and visitors from other States (7.6).

Awareness of threats to the NSW coastal environment

There are a diverse range of threats facing the NSW coast. These range of local threats to marine life and the environment from littering and pollution, as well as the downstream effects from agriculture, land clearing, sediment runoff and other types of human activity.

A large proportion of Coastal Visitors of NSW were “fully aware” of a diverse range of threats, including:

Marine litter can injure and kill wildlife through ingestion or entanglement

64%
are “Fully Aware”

Most marine litter comes from land sources

50%

Human presence can impact wildlife by causing them to move away from feeding, resting and breeding areas

46%

Nutrients and sediments that are washed into drains and creeks can end up in waterways

49%

Visitors who are NSW Residents generally have higher awareness than visitors from other States of all threats listed.

Impact of key threats on visitor experiences

Coastal Visitors rated a number of key threats to their personal use of the NSW coast. Considering the contribution of the NSW coast to the quality of life and personal health of Coastal Visitors, threats that significantly impact personal use are of particular concern.

The threats identified as having the greatest current impact on visitor experience include:

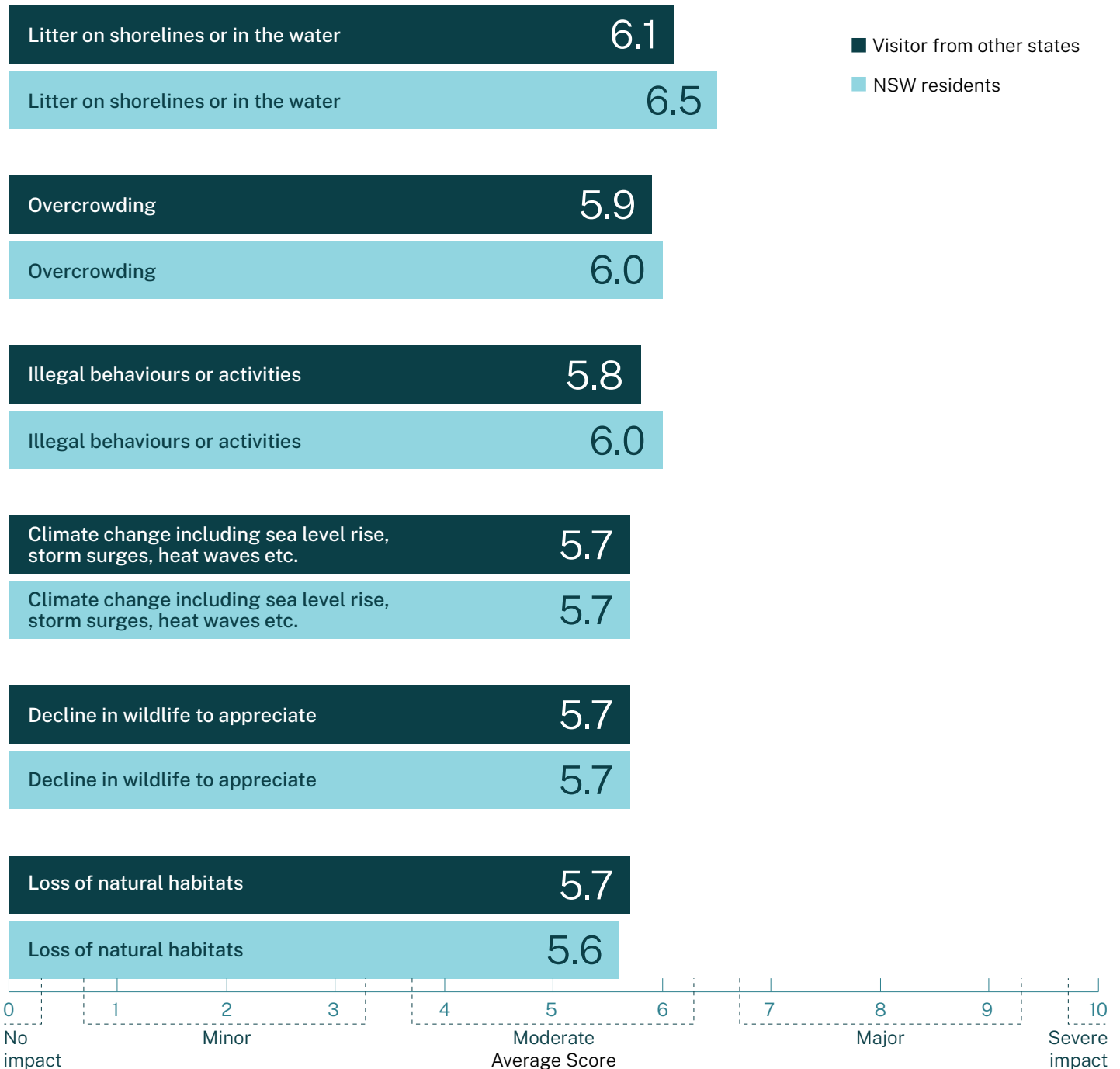
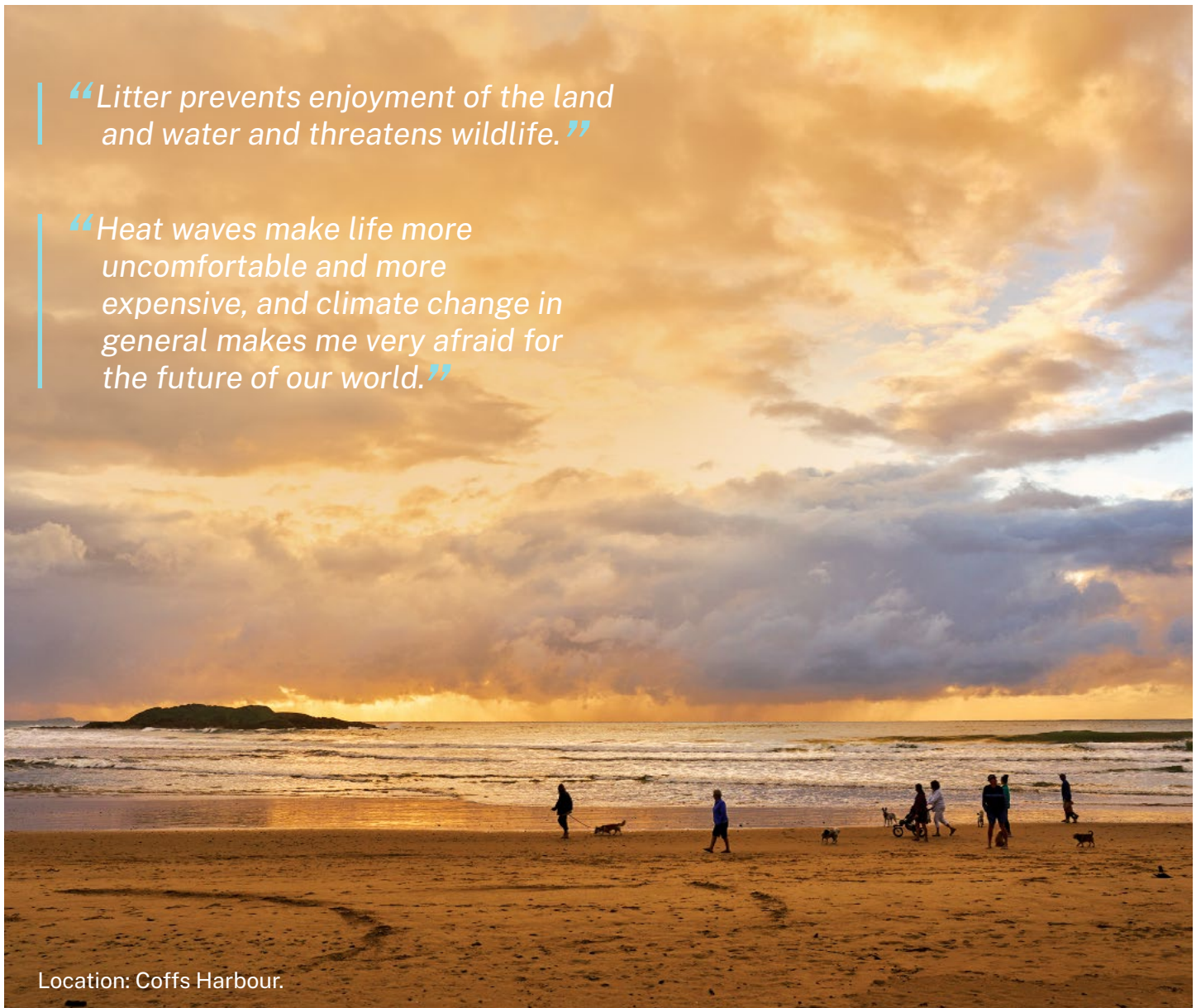


Figure 7: Impact of key threats to visitor experience on the NSW Coast, 2021.

Generally, visitors who are NSW Residents scored impacts to community experience higher than that of visitors from other States.

“Litter prevents enjoyment of the land and water and threatens wildlife.”

“Heat waves make life more uncomfortable and more expensive, and climate change in general makes me very afraid for the future of our world.”



Location: Coffs Harbour.

Visitor stewardship of the marine estate

Importance of managing the NSW marine estate

Managing the NSW marine estate is critical to maximising the benefits and contributions of the NSW coast to the personal health and quality of life of visitors. It's also essential to ensure the prevailing threats to the natural environment and visitor experience are identified, mitigated and addressed.

Coastal Visitors consider all identified reasons for managing the NSW coast relatively important with an average score of at least 7.6 out of 10. However, three reasons were viewed as particularly important for managing the NSW marine estate, including to:

- Pass on a healthy NSW coast to future generations (8.6 out of 10)
- Preserve nature—even though it may never be used or seen by humans (8.4) and
- Provide a place where people can connect with nature (8.3).

Reasons for managing the NSW marine estate:

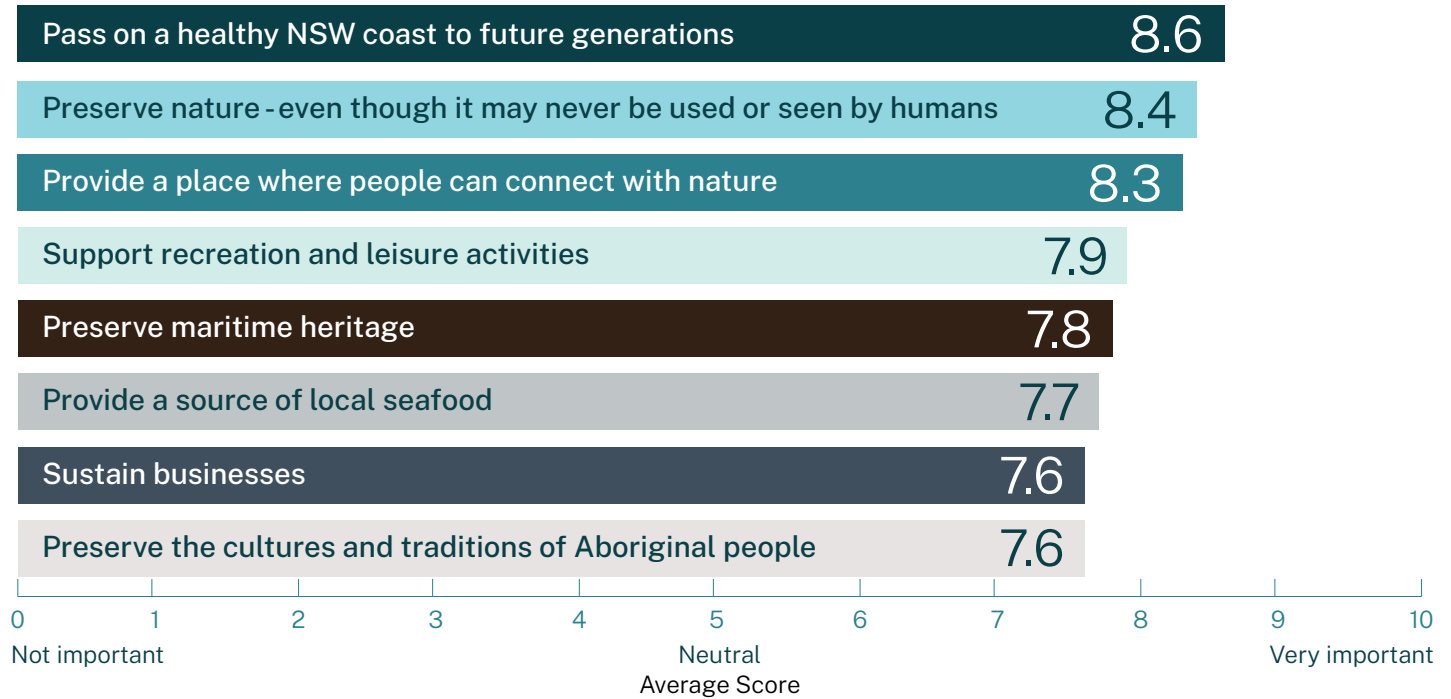
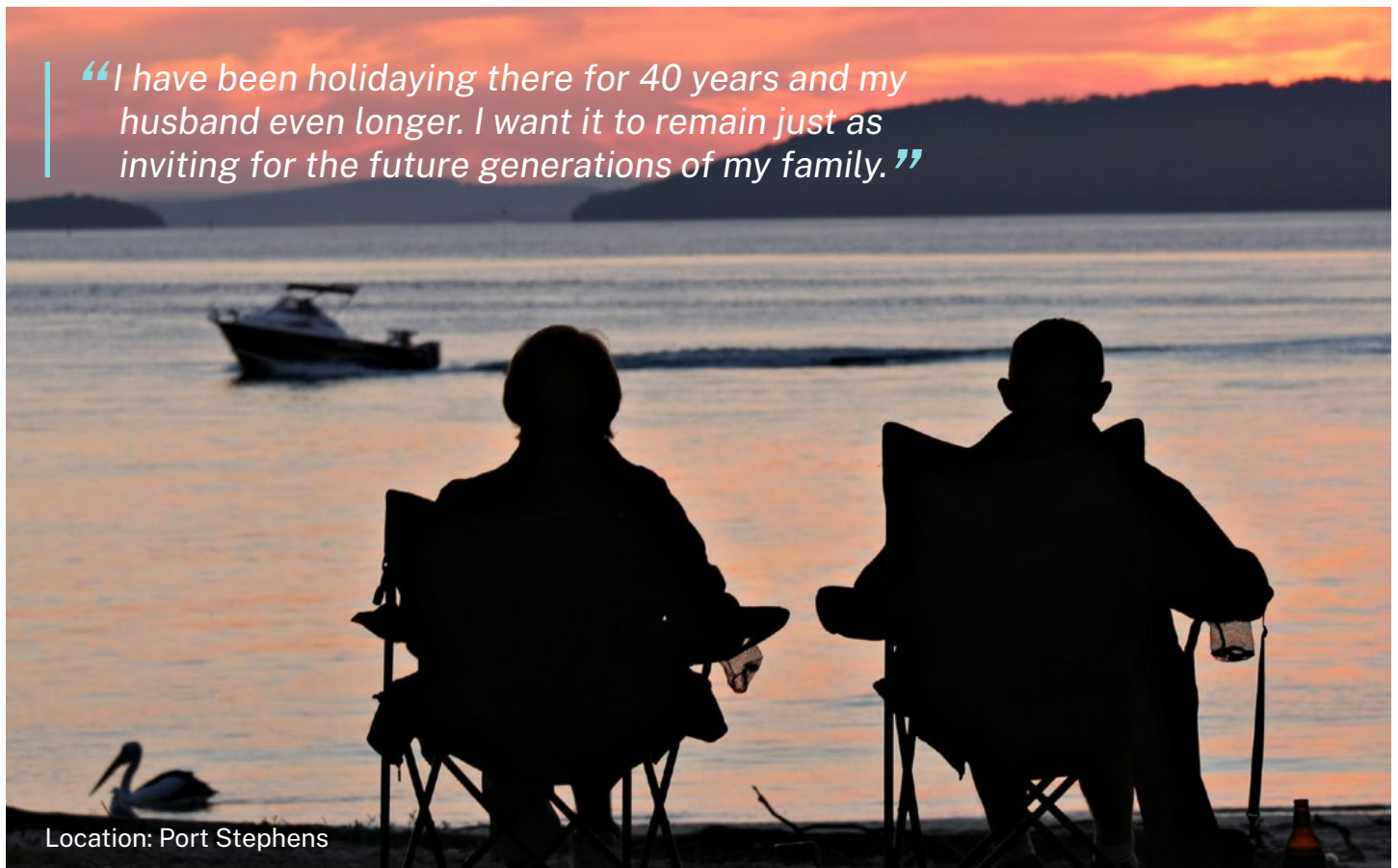


Figure 8: Perceived importance of managing the NSW marine estate, average scores (out of 10), 2021.

These reasons show a strong focus on creating and sustaining long-term intergenerational environments along the NSW coast including for the sake of protecting the environment itself, even if it's not used or seen by people. Overall, visitors who are NSW residents scored all reasons for managing the NSW marine estate higher in terms of importance than visitors from other States.



Personal responsibility

Coastal Visitors have a moderately strong sense of personal and visitor responsibility for maintaining a healthy NSW coast. When asked whether they had a sense of personal responsibility towards maintaining a healthy NSW coast, 29% “Agreed” and 21% “Strongly Agreed” (with an overall score of 7.2 out of 10). Again, visitors who are NSW residents scored higher (7.3 out of 10) compared to visitors from other States (6.9 out of 10).

This personal responsibility is reflected in moderately strong rates of participation by Coastal Visitors in responsible behaviours that benefits the NSW marine estate and in environmental best practices.

This is also reflected in a comparatively strong understanding of the rules and regulations related to the NSW coast.

There was no statistical significance in the level of understanding between visitors who are NSW residents and visitors from other States.

Location: The Pass, Byron Bay.

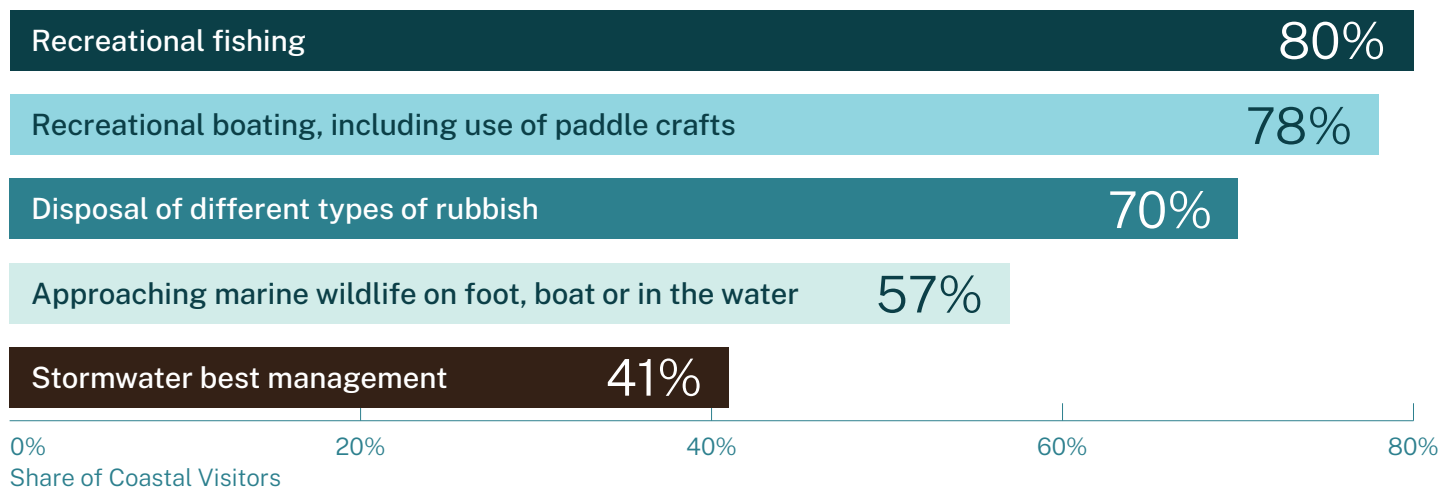
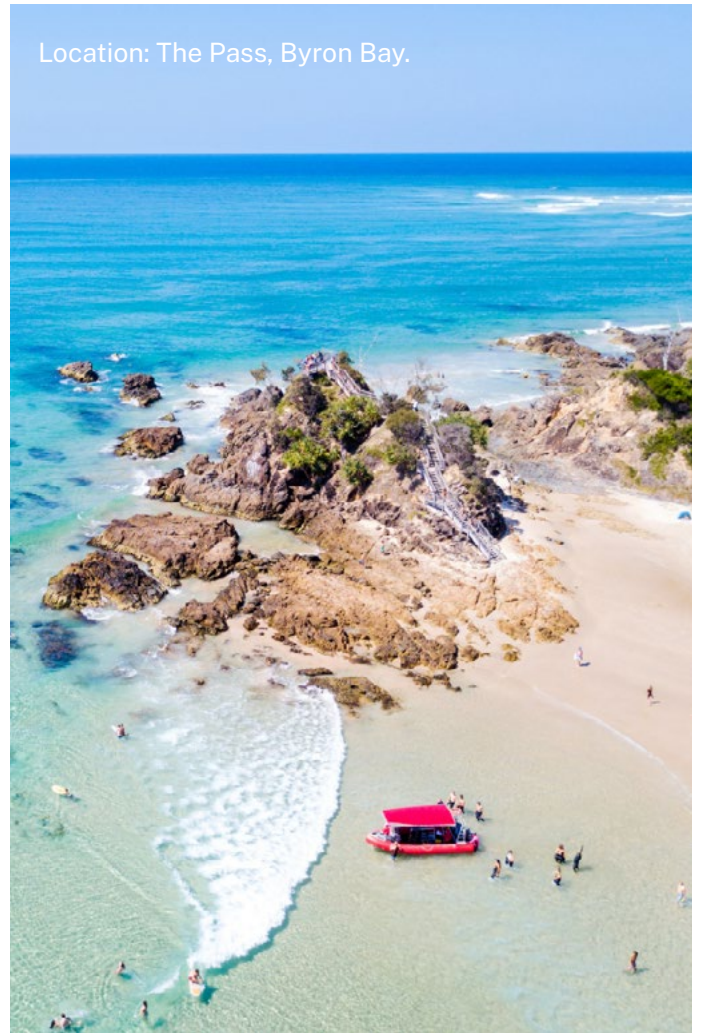


Figure 9: Share of Coastal Visitors that understand different environmental rules and regulations “Fairly well”, 2021.

This is also reflected in participation in environmental best practices, with Coastal Visitors reporting high levels of participation across a range of practices.

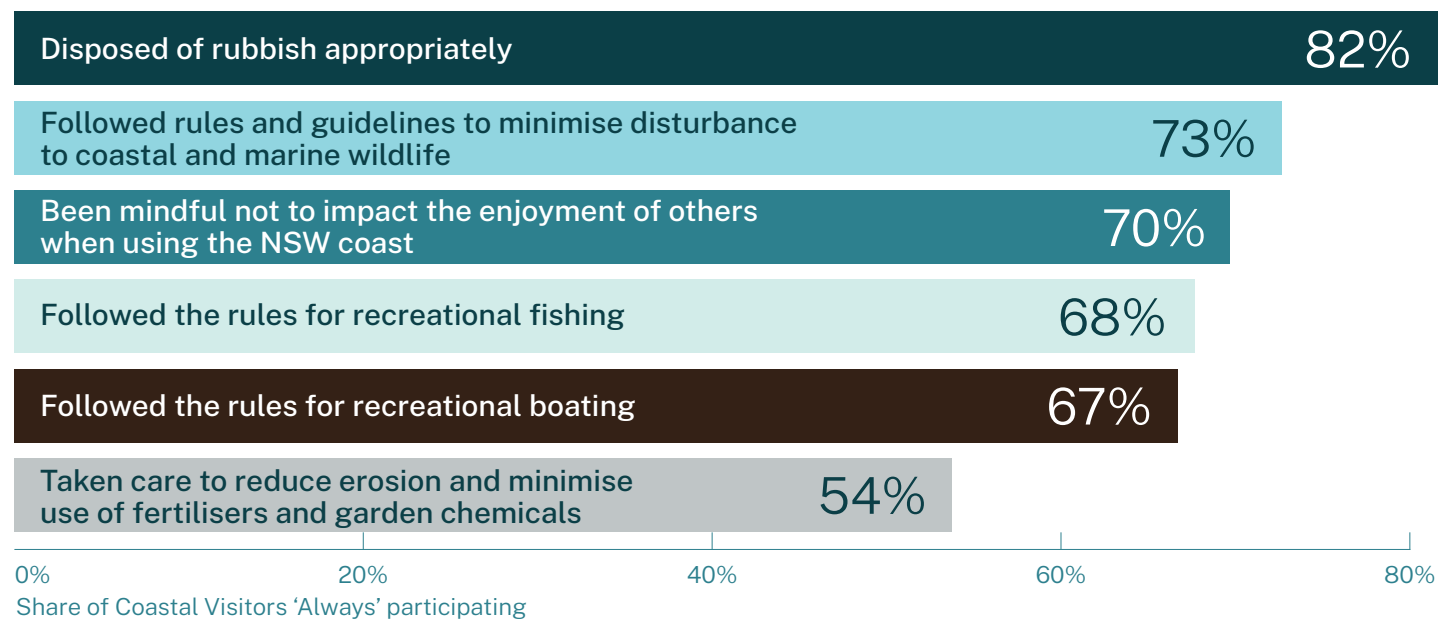


Figure 10: Share of Coastal Visitors “Always” participating in environmental best practice activities, 2021.

Trust in Government

While general awareness of the Marine Estate Management Authority is low (with only 12% of Coastal Visitors reporting awareness), overall trust in the NSW Government to achieve the vision for the NSW marine estate is high:

- 50% were very confident in the NSW Government and
- 39% were fairly confident.





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marine.nsw.gov.au**

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