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Crynodeb Gweithredol

Cyflwyniad

Comisiynwyd Freshwater, mewn cydweithrediad ag OB3 Research, gan Cyfoeth Naturiol Cymru (CNC) i hwyluso sgwrs genedlaethol o dan y pennawd 'Natur a Ni' i helpu i ddatblygu gweledigaeth a rennir ar gyfer amgylchedd naturiol Cymru yn y flwyddyn 2050.

Dechreuodd y sgwrs genedlaethol ym mis Chwefror 2022. Erbyn mis Mai yr un flwyddyn, roedd mwy na 50,000 o bobl wedi ymweld â gwefan Natur a Ni, a mwy na 3,000 o unigolion wedi rhannu eu barn drwy arolwg ar-lein. Mynychodd unigolion weminarau ar-lein, gweithdai a grwpiau ffocws hefyd. Cyhoeddwyd canfyddiadau cam cyntaf y sgwrs genedlaethol, sef yr ymarfer cyfranogi, ym mis Gorffennaf 2022¹. Amlygodd yr adroddiad y pryderon sydd gan bobl am yr amgylchedd naturiol, sut maent yn dymuno bydd yr amgylchedd naturiol yn edrych yn y dyfodol a sut mae angen i gymdeithas newid.

Wrth i'r cam cyntaf nesu at ei derfyn, gwnaeth CNC ddod â grŵp o ymchwilyr cymdeithasol ynghyd i roi cyngor ar gam nesaf y gwaith. Cynhaliwyd gweithdy gyda'r grŵp hwn ym mis Mai 2022, a chytunwyd y dylai'r dadansoddiad thematig a gynhaliwyd yn ystod cam un lywio cam dau o'r sgwrs genedlaethol. Cytunwyd hefyd y dylai'r ail gam brofi canfyddiadau cam un ac ymgysylltu â gwahanol grwpiau nad oedd wedi cyfrannu eto er mwyn canfod p'un a oeddent yn gallu gweld eu hunain yn y data.

Datblygwyd cyfres o 13 o ddatganiadau a oedd yn cynrychioli'r prif themâu a gododd o ddadansoddiad thematig canfyddiadau'r cam cyntaf. Cafodd y rhain eu profi, ac yna eu mireinio gan greu rhestr fyrrach o naw datganiad, a nodir isod:

Naw datganiad allweddol am ddyfodol yr amgylchedd naturiol

1. **Siopa am bethau.** Rwy'n ystyriol am y dillad, y bwyd a'r nwyddau cartref rwy'n eu prynu. Rwy'n ceisio chwilio am bethau sy'n para'n hirach ac y gellir eu trwsio. Rwy'n dewis cynnyrch lleol neu bethau sy'n cael eu hailgylchu neu sy'n ail law. Rwy'n gwneud hyn gan ei bod yn hawdd dod o hyd i bobl leol a fydd yn trwsio pethau sydd wedi torri, ac mae'n lleihau faint o adnoddau yr wyf yn eu defnyddio.

¹ [Cyfoeth Naturiol Cymru / Natur a Ni - menter genedlaethol ar ddyfodol amgylchedd naturiol Cymru](#)



- 2. Teithio o gwmpas.** Rwy'n cerdded, beicio neu'n mynd ar drafnidiaeth gyhoeddus llawer yn fwy nawr pan fydd angen i mi deithio. Mae'r system drafnidiaeth yn hyblyg, felly gall pobl ag anghenion symudedd gwahanol ei defnyddio. Mae digon o gyfleusterau ar gyfer gwefru ceir trydan a rhannu ceir. Mae'r opsiynau a'r dewisiadau mor eang a chysylltiedig, mae llai o bobl yn defnyddio eu ceir eu hunain ar gyfer teithiau byrrach nawr ac mae'r aer yn lanach.
- 3. Defnyddio ynni.** Mae fy nhŷ wedi'i insiwleiddio'n ddiogel ac mae arno baneli solar ac rydym yn dal glaw ac yn ei hidlo trwy ardd gymunedol yn y stryd. Pan fydd angen ynni ychwanegol arnaf, mae'n dod o ynni adnewyddadwy a gynhyrchir yng Nghymru, gan gynnwys ynni'r llanw. Dwi'n gweld fy mod yn defnyddio llai o ynni ar gyfer gwresogi gan fod y tŷ mor gynnes.
- 4. Prynu bwyd.** Rwy'n bwyta'n wahanol nawr i sut roeddwn i'n arfer gwneud 20 mlynedd yn ôl. Rwy'n fwy ymwybodol o'r adeg o'r flwyddyn y mae gwahanol ffrwythau a llysiau ar gael oherwydd eich bod yn eu gweld mewn marchnadoedd lleol. Efallai fy mod yn bwyta cig a physgod ond rwy'n gwneud yn siŵr fy mod yn prynu brandiau Cymreig lle bynnag y gallaf, gan fy mod yn ymddiried yn y safonau ffermio a physgota sydd gennym yma.
- 5. Ailgylchu.** Rwyf wedi sylwi y gall bron popeth a brynwch gael ei aildefnyddio neu ei ailgylchu nawr - ac mae llawer llai o blastig o gwmpas. Rwy'n defnyddio'r siop ail-lenwi leol hefyd oherwydd gallwn gael ein grawnfwydydd, blawd a siwgr yno. Rydyn ni'n treulio mwy o amser yn siopa nag oedden ni'n arfer ei wneud, ond hefyd yn prynu mwy gan fusnesau lleol sy'n cefnogi eu cymuned.
- 6. Gwyliau gartref.** Rwy'n cael gwyliau gartref eleni. Rwyf wrth fy modd ein bod wrth ymyl yr arfordir un diwrnod, ac yna yn y mynyddoedd y diwrnod nesaf yng Nghymru. A gallaf adael fy nghar gartref oherwydd bod gan Gymru rwydwaith trafndiaeth gyhoeddus dda iawn. Er ei fod yn brysur yn ystod misoedd yr haf, mae yna fannau tawel y gallwch chi ddod o hyd iddyn nhw o hyd.
- 7. Mannau gwyrdd.** Lle rwy'n byw mae mynediad da i fannau gwyrdd. Mae pobl yn eu defnyddio ar gyfer iechyd, dysgu awyr agored a mwynhad. Maent hefyd yn cael eu rheoli ar gyfer bywyd gwyllt, gyda gwirfoddolwyr lleol yn helpu i gynnal y manau gwyrdd hyn ar gyfer pobl a natur. Rwy'n sylwi ar fwy o fywyd gwyllt o gwmpas lle rwy'n byw, fel adar a phryfed.
- 8. Rheoli tir.** Mae'r tir o'm cwmpas ac yng nghefn gwlad yn cael ei ddefnyddio ar gyfer cynhyrchu ystod o wahanol fwydydd ond mae hefyd yn cael ei reoli er budd cymunedau. Mae rheolwyr tir yn gwneud hyn i leihau effeithiau llifogydd a sicrhau bod ein hafonydd a'n moroedd yn glir o lygredd. Mae mwy o amrywiaeth yn y dirwedd – gwahanol fathau o dda byw, mwy o ardaloedd coediog gyda gwahanol fathau o goed.



9. Coetiroedd. Mae mwy o goetiroedd o gwmpas lle rwy'n byw. Rydych chi'n gwybod pa goedwigoedd sy'n goedwigoedd gwaith, a chan fod mwy o bobl o'r gymuned yn cymryd rhan, rydw i'n mynd i lawr yno i weld beth sy'n digwydd. Mae ganddyn nhw lwybrau, gweithgareddau a digwyddiadau gwych yn y goedwig. Does dim mynediad i rai ardaloedd gan eu bod naill ai'n clirio coed, ar ffermydd gweithredol, neu'n cael eu gadael i natur.

Y bwriad oedd y byddai'r ail gam yn mynd i'r afael â bylchau daearyddol a demograffig yn data cam un, yn ogystal ag archwilio safbwyntiau perchnogion neu reolwyr busnesau bach, gan gynnwys ffermwyr, ymhellach. Y bwriad hefyd oedd i grŵp o ymatebwyr a oedd eisoes wedi ymgysylltu yn ystod cam cyntaf y sgwrs genedlaethol profi'r datganiadau.

Prif amcanion ail gam yr ymchwil oedd i wneud y canlynol:

- profi p'un a oedd ymatebwyr cam un yn cytuno â'r dehongliad o ganfyddiadau ymarfer cyfranogi cam un
- profi p'un a oedd grwpiau heb gynrychiolaeth ddigonol yn cytuno â chanfyddiadau ymarfer cyfranogi cam un a'r themâu blaenoriaeth
- deall pa ddatganiadau y mae pobl yn cytuno fwyaf neu leiaf â nhw, a pham
- helpu i ddeall a chydabod ym mha feysydd y gwelir y lefel fwyaf o anghytundeb a chonsensws o fewn y gwahanol garfannau a rhyngddynt
- nodi'r rhwystrau a'r cymhellion cyffredin ar gyfer gwahanol weledigaethau ar gyfer y dyfodol,
- casglu naratifau a phrofiadau personol a sbardunwyd gan y naw datganiad i helpu i lunio'r weledigaeth.

Dull

Defnyddiwyd dau ddull o gasglu data sef arolwg a thrafodaethau grŵp ffocws. Roedd yr arolwg yn gofyn i ymatebwyr wneud y canlynol:

- sgorio pob un o'r naw datganiad am y dyfodol ar raddfa o 1 i 5 (gydag 1 yn nodi na fyddech eisiau byw felly o gwbl a 5 yn nodi y byddech yn bendant eisiau byw felly)
- meddwl am y dyfodol a'r hyn roedden nhw'n teimlo allai fod yn bosibl, a dewis un o'r datganiadau sy'n disgrifio i'r graddau mwyaf sut hoffent fyw ac esbonio pam, gan dynnu ar brofiadau personol



- dewis pa ddatganiad sy'n disgrifio i'r graddau lleiaf sut hoffent fyw a pham, gan dynnu ar brofiadau personol.

Derbyniwyd cyfanswm o 591 o ymatebion i'r arolwg. O'r rhain, roedd 305 yn ymatebion ar-lein gan unigolion a oedd wedi ymgysylltu â cham cyntaf Natur a Ni yn flaenorol. Roedd 286 yn ymatebion sioeau teithiol a gasglwyd trwy gyfres o ddigwyddiadau a gynhaliwyd yn ystod haf 2022. Mae'r ddwy garfan yma yn adlewyrchu dwy gynulleidfa wahanol. Mae'r gyntaf yn cynrychioli'r bobl a gymerodd ran drwy gydol cam un, ac mae'r ail garfan yn cynrychioli lleoliadau ledled Cymru nad oedd ganddynt gynrychiolaeth ddigonol yng ngham un.

Trefnwyd sesiynau grwpiau ffocws gyda grwpiau penodol nad oedd ganddynt gynrychiolaeth ddigonol yn sampl cam un. Cynhaliwyd grwpiau ffocws gyda phobl o gefndiroedd lleiafrifoedd ethnig, pobl ifanc, y gymuned fusnes, a'r gymuned ffermio. Cynhaliwyd cyfanswm o 16 o sesiynau grŵp ffocws gyda 157 o gyfranogwyr yn bresennol. O'r rhain, roedd 11 wyneb yn wyneb a phump yn rhithwir. Gofynnwyd hefyd i gyfranogwyr mewn grwpiau ffocws wyneb yn wyneb sgorio'r naw datganiad yn yr un modd ag ymatebwyr yr arolwg.

Yr ystyriaethau methodolegol allweddol yw'r canlynol:

- cynlluniwyd yr ymarfer hwn i gael dealltwriaeth ddyfnach o farn pobl ar y datganiadau am y dyfodol ac i nodi gwerthoedd a rennir a'r rhai sy'n cael eu herio
- roedd y dull yn effeithiol o ran ymgysylltu â chynulleidfa fwy amrywiol ac unigolion na fyddent o bosibl wedi cyfrannu at y sgwrs genedlaethol fel arall
- roedd yr arolwg yn y sioeau teithiol yn ddefnyddiol i nodi *beth* mae cynulleidfa fwy amrywiol yn ei feddwl, ond nid o reidrwydd *pam* y maent yn meddwl hynny, gan fod yr adborth ansoddol a gafwyd gan y garfan hon yn gyfyngedig
- roedd y trafodaethau grŵp ffocws yn galluogi hwyluswyr i dreulio amser yn archwilio *pam* roedd unigolion yn teimlo'n gryfach am ddatganiadau penodol ac asesu pa rai oedd yn denu'r lefel uchaf o gefnogaeth.

Mae'r prif gyfyngiadau methodolegol yn cynnwys y canlynol:

- ni chasglwyd unrhyw ddata personol neu economaidd-gymdeithasol ar gyfer y cyfranogwyr yn ystod y cam hwn o'r ymchwil. O ganlyniad, mae unrhyw gasgliadau



a wneir, sy'n seiliedig ar wahaniaethau barn yn ôl oedran, ethnigrwydd neu garfanau demograffig eraill, yn gyfyngedig

- er gwaethaf y gwaith profi, roedd yn anodd i rai cyfranwyr i restru'r datganiadau a mynegi hoffterau. Roedd hyn oherwydd amrywiaeth o ffactorau, gan gynnwys pobl yn gweld y datganiadau'n gymhleth ac yn gwrth-ddweud ei gilydd, neu eisiau mwy o fanylion am union natur y camau gweithredu a fyddai'n arwain at y dyfodol a ddisgrifiwyd.

Canfyddiadau allweddol

Mae canfyddiadau allweddol ymchwil cam dau wedi'u nodi isod, a'u bwriad yw mynd i'r afael â phob un o'r chwe amcan ymchwil:

A oedd ymatebwyr cam un yn cytuno â'r dehongliad o ganfyddiadau ymarfer cyfranogi cam un

- roedd ymatebwyr cam un yn cefnogi'r newidiadau a oedd wedi'u nodi ar draws datganiadau am y dyfodol ac roedd y mwyafrif eisiau byw yn y ffordd a ddisgrifiwyd 'gryn dipyn' neu 'yn bendant', gan awgrymu bod y garfan hon yn cytuno â'r dehongliad o ganfyddiadau cam un
- ychydig iawn o ymatebwyr cam un oedd yn meddwl bod bylchau yn y themâu blaenoriaeth a nodwyd yn y datganiadau neu oedd yn cwestiynu'r budd i natur yn y dyfodol a fyddai'n dod o'r naw datganiad hyn.

A oedd grwpiau heb gynrychiolaeth ddigonol yn cytuno â chanfyddiadau ymarfer cyfranogi a themâu blaenoriaeth cam un

- roedd grwpiau heb gynrychiolaeth ddigonol (a gyfrannodd drwy'r arolwg sioeau teithiol a thrafodaethau grwpiau ffocws) hefyd yn gefnogol i'r newidiadau a ddisgrifiwyd ar draws y naw datganiad ac eisiau byw fel hyn yn y dyfodol
- mynegodd carfan arolwg ar-lein cam un awydd llawer cryfach na'r ddwy garfan ymchwil arall eu bod am fyw eu bywydau fel y nodwyd yn y datganiadau. Mae hyn yn awgrymu bod carfan y cam cyntaf yn fwy ymgysylltiol, gwybodus ac ymroddedig i faterion amgylcheddol a chynaliadwyedd na'r rhai a gymerodd ran yn yr ymchwil am y tro cyntaf yn ystod cam dau



- bydd y themâu y mae'r naw datganiad yn ymdrin â nhw yn darparu fframwaith defnyddiol ar gyfer sgysiau am ddyfodol gadarnhaol i natur.

Pa ddatganiadau y mae pobl yn cytuno fwyaf neu leiaf â nhw, a pham, ac ym mha feysydd y ceir y lefel fwyaf o anghytundeb a chonsensws oddi fewn i'r gwahanol garfanau a rhyngddynt

- pan ofynnwyd iddynt, amlygodd y tair carfan ymchwil (ymatebwyr arolwg ar-lein, ymatebwyr arolwg sioeau teithiol a chyfranogwyr grwpiau ffocws) y datganiadau sy'n canolbwyntio ar **fannau gwyrdd**, **siopa am bethau**, **ailgylchu** a **phrynu bwyd** fel y dyfodol y byddent yn fwyaf tebygol o weld eu hunain yn byw ynddo. Mae dyfodol cadarnhaol sy'n seiliedig ar y pedair thema yma yn debygol o gael mwy o ymateb gan ystod ehangach o'r boblogaeth
- er eu bod yn parhau i fod yn gefnogol iddynt yn gyffredinol, nododd y tair carfan ymchwil **gwyliau gartref** a **theithio o gwmpas**, fel y dyfodol y byddent leiaf tebygol o weld eu hunain yn byw ynddo, yn bennaf oherwydd nad yw'r datganiadau hyn yn cael eu hystyried yn gyraeddadwy a realistig. Mae angen gwneud rhagor o waith i ddeall yr elfennau sydd yn y ddau ddatganiad yma y mae pobl yn eu hystyried yn anymarferol
- cafwyd barn mwy cymysg am rai o'r gosodiadau, megis y **defnydd o ynni** a **rheoli tir**, o ran bod niferoedd tebyg o bobl yn nodi y byddent ac na fyddent yn ffafrio byw yn y modd yr oedd y datganiadau ei ddisgrifio. Mae angen mwy o ofal wrth fframio'r ddau ddatganiad hyn yn y dyfodol
- rhoddodd yr ymchwil fewnwelediad gwerthfawr i sut y mae angen ystyried sut y mae terminoleg yn cael ei fframio. Er enghraifft, nid oedd termau megis **mannau gwyrdd** yn taro deuddeg gyda chyfranwyr o ardaloedd gwledig tra bod termau fel **gwyliau gartref** a **theithio o gwmpas** (gan ddefnyddio ceir trydan) yn cael eu cysylltu â materion fforddiadwyedd.

Rhwystrau a chymhellion cyffredin ar gyfer gwahanol weledigaethau o'r dyfodol

Roedd rhai o'r rhwystrau a'r cymhellion cyffredin a oedd yn gyfrifol am farn ac ymatebion cyfranwyr i'r datganiadau yn cynnwys y canlynol:



o beth) yn rhoi teimlad o sicrwydd i gyfranwyr y dylai unrhyw gamau gweithredu adeiladu ar gryfderau yn hytrach na cheisio ailwampio'r dull o weithredu

- **cost a fforddiadwyedd newid:** roedd hon yn ystyriaeth gyffredin a godwyd gan bob carfan ac a nodwyd fel rhwystr gwirioneddol i newid. Roedd cyfranwyr yn gyffredinol yn tybio y byddai byw mewn modd mwy cynaliadwy yn costio mwy, a phwysleisiodd nifer o gyfranwyr y byddai hyn yn creu heriau iddynt. Roedd nifer yn dadlau'n gryf bod angen cymorth ariannol ar unigolion i fuddsoddi mewn atebion mwy cynaliadwy, megis mewn perthynas â'r datganiad am ddefnyddio ynni.
- **pa mor anghyfleus ac anhygyrch yw newid:** rhwystr cyffredin i gyflawni llawer o'r datganiadau hyn a nodwyd gan gyfranwyr oedd y ffaith bod dewisiadau cynaliadwy yn llai cyfleus a ddim yn hygyrch i unigolion. Roedd hyn yn arbennig o wir am y datganiadau yn ymwneud â gweithgareddau bob dydd fel prynu bwyd, siopa am bethau, a theithio o gwmpas. Mae angen i'r cam o feithrin ffordd mwy cynaliadwy o fyw fod yn newid hawdd a chyfleus i'w wneud.

Bydd yn bwysig bod unrhyw ymarfer cyfranogi yn y dyfodol yn myfyrio ar bob un o'r dylanwadau cyffredin hyn, a mynd i'r afael â nhw pan fyddant yn ystyried y ffordd o gyflwyno'r themâu i'r cyhoedd.

Naratifau a phrofiadau personol a ysgogwyd gan y naw datganiad i helpu i lunio'r weledigaeth

Mae'r canfyddiadau ymchwil a nodir ym Mhennod 4 (adborth ymatebwyr yr arolwg ar ddatganiadau'r dyfodol) a Phennod 6 (canfyddiadau allweddol o drafodaethau grwpiau ffocws) yn nodi naratifau unigol a phrofiadau personol sy'n ymwneud â'r themâu a gyflwynwyd ar draws y naw datganiad ar gyfer y dyfodol. Mae'r rhesymau a roddwyd dros ddewis y datganiadau a oedd yn cael eu ffafrio fwyaf a lleiaf yn aml yn seiliedig ar ystyriaethau a phrofiadau personol. Mae Pennod 6 hefyd yn ystyried rhai o'r themâu cyffredin a godwyd gan gynulleidfaoedd penodol heb gynrychiolaeth ddigonol, gan gynnwys pobl ifanc a chymunedau lleiafrifoedd ethnig.



Executive Summary

Introduction

Freshwater, in collaboration with OB3 Research, was commissioned by Natural Resources Wales (NRW) to facilitate a national conversation under the banner of 'Nature and Us' to help develop a shared vision for the natural environment for Wales in 2050.

The national conversation commenced in February 2022. By May of the same year, the Nature and Us website had been visited by more than 50,000 people, with more than 3,000 individuals sharing their views via an online survey. Individuals also attended online webinars, workshops, and focus groups. The findings from this first involvement exercise phase of the national conversation were published in July 2022². The report highlighted the concerns people have about the natural environment, what they wish the future of the natural environment to look like and how society needs to change.

Towards the completion of the first phase, NRW convened a group of social researchers to advise on the next phase of the work. A workshop was held with this group in May 2022, and it was agreed that phase two of the national conversation should be informed by the thematic analysis undertaken during phase one. It was also agreed that the second phase should test the phase one findings and engage with different groups who had not yet contributed in order to explore whether they saw themselves in the data.

A series of 13 statements was developed which represented the main themes that arose from the thematic analysis of findings from the first phase. These were tested, and then refined into a shorter list of nine statements, set out below:

Nine key statements about the future of the natural environment

1. Shopping for things. I am thoughtful about the clothes, food, and household goods I buy. I try to look for things that last longer and can be repaired. I choose local products or things that are recycled or second hand. I do this as it is easy to find local people who will mend broken things, and it reduces the amount of resources I am using.

² [Natural Resources Wales / Nature and Us - a national initiative on the future of the Welsh natural environment](#)



2. Travelling around. I walk, cycle, or take public transport a lot more now when I need to travel. The transport system is flexible, so it can be used by people with different mobility needs. There are plenty of facilities for electric car charging and for car-sharing. The options and choices are so widespread and connected, fewer people use their own cars for shorter trips now and the air is cleaner.

3. Using energy. My house has safe insulation and solar panels, and we capture rain and filter it through a communal garden in the street. When I do need extra energy, it comes from renewable power generated in Wales, including tidal power. I find that I'm using less energy for heating though as the house stays so warm.

4. Buying food. I eat differently now to how I used to 20 years ago. I'm more conscious of the time of year that different fruits and vegetables are available because you see them in local markets. I may eat meat and fish, but I make sure I buy Welsh brands wherever I can, as I trust in the farming and fishing standards we have here.

5. Recycling. I've noticed that nearly everything you buy can be reused or recycled now – and there's far less plastic around. I use the local refill shop too as we can get our cereals, flour, and sugar there. We spend more time shopping than we used to, but also buy more from local businesses that support their community.

6. Staycation. I'm having a staycation this year. I love that in Wales you can be next to the coast one day, and then in the mountains the next. And I can leave my car at home because Wales has a very good public transport network. Although its busy in the summer months, there are still quiet places you can find.

7. Green spaces. Where I live there is good access to green spaces. People use them for health, outdoor learning and just enjoyment. They are also managed for wildlife, with local volunteers helping to maintain these green spaces for people and nature. I notice more wildlife around where I live, such as birds and insects.

8. Land management. The land around me and in the countryside is used for producing a range of different foods but is also being managed for the benefit of communities. Land managers do this to reduce the impacts of flooding and ensure our rivers and seas are clear of pollution. There is more variety in the landscape – different types of livestock, more wooded areas with different types of trees.



9. Woodlands. There are more woodlands in and around where I live. You can tell which forests are working forests and since more people from the community are involved, I go down there to see what's happening. They have some fantastic trails, activities, and events in the woods. Some areas are out-of-bounds as they are either taking the timber out, on working farms, or leaving them undisturbed for nature.

It was intended that the second phase would address geographic and demographic gaps within the phase one data, as well as further exploring the views of small business owners or managers, including farmers. It was also intended that the statements would be tested with a group of respondents who had already been engaged through the first phase of the national conversation.

The key objectives of the second phase research were to:

- test whether phase one respondents agreed with the interpretation of the phase one involvement exercise findings
- test whether under-represented groups agreed with the phase one involvement exercise findings and priority themes
- understand which statements people most or least agree with, and why
- help understand and acknowledge where the greatest areas of contention and consensus lie within and between the different cohorts
- identify common barriers and motivators for different visions of the future, and
- collect narratives and personal experiences initiated by the nine statements to help shape the vision.

Method

Two data gathering methods were used, a survey and focus group discussions. The survey tool asked respondents to:

- score each of the nine future statements on a scale of 1 to 5 (with 1 being you would not at all want to live like that and 5 being you would definitely want to live like that)



- no personal or socio-economic data was collected from participants during this phase of the research. As a result, any conclusions based upon differences of opinion by age, ethnicity or other demographic cohorts are limited
- despite testing, some of the statements proved difficult for some contributors to rank and express preferences. This was due to a range of factors, including people finding the statements complex and contradictory, or wanting more detail about the exact nature of actions leading to the futures described.

Key findings

The key findings of the phase two research are set out below, and are intended to address each of the six research objectives:

Whether phase one respondents agreed with the interpretation of the phase one involvement exercise findings

- phase one respondents were supportive of the changes set out across the future statements and the majority want to live in the way described ‘quite a lot’ or ‘definitely’, suggesting that this cohort agreed with the interpretation of the phase one findings
- very few phase one respondents thought that there were gaps in the priority themes set out within the statements or questioned the benefit these nine future statements would have for nature.

Whether under-represented groups agreed with the phase one involvement exercise findings and priority themes

- under-represented groups (who contributed via the roadshow survey and focus group discussions) were also supportive of the changes described across the nine statements and want to live in this way in the future
- the phase one online survey cohort expressed a much stronger desire than the other two research cohorts that they want to live their lives as set out within the statements. This suggests that the first phase cohort are more engaged, knowledgeable, and committed to environmental and sustainability issues than those who engaged with the research for the first time during phase two



- the themes that the nine statements cover will provide a useful framework for conversations about a nature positive future.

Which statements people most or least agree with, and why, and the greatest areas of contention and consensus lie within and between the different cohorts

- all three research cohorts (online survey respondents, roadshow survey respondents and focus groups participants) when asked, highlighted the statements which focus on green spaces, shopping for things, recycling and buying food as the futures in which they would most likely see themselves living. Positive futures based on these four themes are likely to have more traction with a broader range of the population
- whilst still overall supportive of them, the three research cohorts identified staycation and travelling around, as futures in which they would least likely see themselves living, largely because these statements are not viewed as achievable and realistic. Further work is needed to understand the elements of these two statements that people see as unviable
- some of the statements, such as energy use and land management, generated more mixed opinions, in that similar numbers of people most and least preferred to live like the statements described. More care is needed in the framing of these two statements in the future
- the research provided a valuable insight into the framing of terminology. For example, terms such as green spaces did not resonate particularly well with contributors from rural areas whilst terms such as staycation and travelling around (using electric cars) were associated with issues of affordability.

Common barriers and motivators for different visions of the future

Some of the common barriers and motivators which account for contributors' views and responses to the statements included:

- **what people feel they have control over:** in many cases individuals and groups focused on those statements which they felt are within their remit to change. Many contributors were less engaged and interested in some of the broader statements



around woodlands and land management, as they did not see the direct relevance to their day to day lives

- **whether they are already doing the desired behaviour:** in these cases, contributors thought that they were already behaving and adopting practices which are in keeping with the vision set out within the statement and as such saw little scope to extend or change their behaviours. They selected statements which described how they would most like to live as those which required them to change habits and which they considered to be more ambitious
- **whether change is practical and realistic:** two of the statements in particular, staycation and travelling around, were challenged the most in terms of their practicality and contributors struggled to imagine them becoming a reality. Contributors found it difficult to imagine a future where they made greater use of public transport if, for instance, they lived in a rural area. In contrast, the recycling statement was considered to be more practical and achievable for individuals to adopt which might explain the stronger degree of preference expressed over this
- **what change will achieve the greatest positive impact:** some contributors were driven to select statements which they thought would lead to the greatest positive impact upon the environment and nature. The land management statement often fell into this category as contributors believed its implementation would bring about a large, positive impact upon the climate crisis
- **where the greatest need for urgent action is:** the rationale for selecting particular statements was driven in these cases by a perceived need for urgent and dramatic action, and frustration at the lack of progress being made. In contrast, the progress made across some statements (recycling being the main one) provided reassurances to contributors that action should be about building on strengths rather than an overhaul of the approach
- **the cost and affordability of change:** this was a common consideration raised by all cohorts and identified as a real barrier to change. Contributors in general assumed that living more sustainability would cost more, and many contributors stressed the challenges this would pose for them. There was a strong argument that individuals require financial support to invest in more sustainable solutions, such as in relation to the using energy statement.



- **the inconvenience and inaccessibility of change:** a common barrier raised by contributors to achieving many of these statements related to sustainable options being less convenient and not accessible to individuals. This was particularly true for everyday statements such as buying food, shopping for things, and travelling around where embracing a more sustainable way of living must be an easy and convenient change to make.

It will be important for any future involvement exercise to reflect upon, and address each of these common influences, in the way themes are presented to the public.

Narratives and personal experiences initiated by the nine statements to help shape the vision

The research findings set out at Chapter 4 (survey respondents' feedback on the future statements) and Chapter 6 (key findings from focus group discussions) set out individual narratives and personal experiences relating to the themes presented across the nine future statements. The arguments put forward for making selections around most and least preferred statements often draw upon personal reflections and experiences. Chapter 6 also considers some of the common themes raised by specific under-represented audiences, including young people and ethnic minority communities.



1. Introduction

Background

- 1.1 Freshwater, in collaboration with OB3 Research, was commissioned by Natural Resources Wales (NRW) to facilitate a national conversation under the banner of ‘Nature and Us’ that would help develop a shared vision for the natural environment for Wales. The national conversation commenced in February 2022. By May of the same year, the Nature and Us website had been visited by more than 50,000 people, with more than 3,000 individuals sharing their views via an online survey. Individuals also attended online webinars, workshops, and focus groups. The findings from this first phase of the national conversation, the involvement exercise, were published in July 2022³. The report highlighted the concerns people have about the natural environment, what they wish the future of the natural environment to look like and how society needs to change.
- 1.2 Following the completion of the involvement exercise, NRW convened a group of social science specialists to advise and provide input into the research methodology for the next phase of the work. A workshop was held with these social researchers in May 2022 to help design the next phase of the national conversation, the visioning phase. It was clear from the workshop that there was no single correct method of conducting the visioning phase, although there was a consensus that the approach should take into account some key principles and considerations. It was agreed that phase two of the national conversation should:
- adopt a thematic analysis approach to test common elements of understanding across the phase one data, and to frame further questions to explore
 - focus on ‘action’ words and things that people would do differently in the future

³ [Natural Resources Wales / Nature and Us - a national initiative on the future of the Welsh natural environment](#)



- involve different groups who had not engaged with phase one of the research, to help minimise any analysis bias and ensure under-represented groups are properly considered
- carefully consider the language used by participants and researchers, and think about the importance of language in how the data should be presented
- justify any targeting of under-represented groups within phase two research.

- 1.3 It was agreed that the visioning phase should be informed by some key principles, including the need for the national conversation to continue and be ongoing; and for it to be developed and delivered in a pragmatic way within the time constraints set. It was also considered important that the second phase built on the methodology of asking people whether they saw themselves in the data and for the approach to draw out deeper insights into particular views. Phase two needed to be informed by the thematic analysis undertaken as part of the first phase, as these were considered to be key areas to explore in more depth.
- 1.4 Following the workshop with social researchers, a series of statements were developed that represented the main themes that arose from phase one. These statements drew heavily on the responses received to a particular question asked within the phase one survey: 'Imagine life in 2050. Think about how different life may be for you or your family. Describe the future natural environment that you would choose'. In total, 13 statements were generated that represented topics which appeared, in some form, in 15% or more of the survey responses to this question.
- 1.5 These 13 statements represented the voices of an 'already engaged' audience about the future and were a strong position from which to start the visioning phase. It was agreed that the visioning phase would focus on asking people who had not been part of the phase one conversation about the extent to which they saw themselves as part of that future. The statements would also be a useful way of exploring any barriers or challenges that prevented people seeing themselves in that future, as well as what appealed to them about the statements.



- 1.6 The 13 statements were tested with NRW staff and at public events in Bridgend and Blaenau Gwent. In light of feedback that there was some overlap or ambiguity between a few of the statements they were then reduced to nine statements. The language of the statements was also simplified, and the first-person narrative used to better convey that they were voices from people living in 2050. Testing also suggested some ambiguity or confusion in the wording, but it was decided not to change the wording that had been directly derived from phase one data. This has since been recognised as a limitation to the methodology.
- 1.7 The nine statements are set out at Figure 1.1.

Figure 1.1: Nine key statements about the future of the natural environment

<p>1. Shopping for things. I am thoughtful about the clothes, food, and household goods I buy. I try to look for things that last longer and can be repaired. I choose local products or things that are recycled or second hand. I do this as it is easy to find local people who will mend broken things, and it reduces the amount of resources I am using.</p>
<p>2. Travelling around. I walk, cycle, or take public transport a lot more now when I need to travel. The transport system is flexible, so it can be used by people with different mobility needs. There are plenty of facilities for electric car charging and for car-sharing. The options and choices are so widespread and connected, fewer people use their own cars for shorter trips now and the air is cleaner.</p>
<p>3. Using energy. My house has safe insulation and solar panels, and we capture rain and filter it through a communal garden in the street. When I do need extra energy, it comes from renewable power generated in Wales, including tidal power. I find that I'm using less energy for heating though as the house stays so warm.</p>
<p>4. Buying food. I eat differently now to how I used to 20 years ago. I'm more conscious of the time of year that different fruits and vegetables are available because you see them in local markets. I may eat meat and fish, but I make sure I buy Welsh brands wherever I can, as I trust in the farming and fishing standards we have here.</p>



5. Recycling. I've noticed that nearly everything you buy can be reused or recycled now – and there's far less plastic around. I use the local refill shop too as we can get our cereals, flour, and sugar there. We spend more time shopping than we used to, but also buy more from local businesses that support their community.

6. Staycation. I'm having a staycation this year. I love that in Wales you can be next to the coast one day, and then in the mountains the next. And I can leave my car at home because Wales has a very good public transport network. Although its busy in the summer months, there are still quiet places you can find.

7. Green spaces. Where I live there is good access to green spaces. People use them for health, outdoor learning and just enjoyment. They are also managed for wildlife, with local volunteers helping to maintain these green spaces for people and nature. I notice more wildlife around where I live, such as birds and insects.

8. Land management. The land around me and in the countryside is used for producing a range of different foods but is also being managed for the benefit of communities. Land managers do this to reduce the impacts of flooding and ensure our rivers and seas are clear of pollution. There is more variety in the landscape – different types of livestock, more wooded areas with different types of trees.

9. Woodlands. There are more woodlands in and around where I live. You can tell which forests are working forests and since more people from the community are involved, I go down there to see what's happening. They have some fantastic trails, activities, and events in the woods. Some areas are out-of-bounds as they are either taking the timber out, on working farms, or leaving them undisturbed for nature.

1.8 The second phase approach was also informed by an analysis of socio-demographic characteristics of phase one contributors. Some gaps in representation were identified and these were split into geographic gaps, and demographic gaps:

- **geographic gaps:** there was under-representation from across the eight local authority areas of Bridgend, Merthyr Tydfil, Rhondda Cynon Taf, Caerphilly, Blaenau Gwent, Torfaen, Wrexham, and Flintshire. These gaps



were addressed testing the statements with people from these areas through attending local events, and in doing so, aim to test any geographic differences across the dataset (referred to as ‘roadshow’ data)

- **demographic gaps:** there was under-representation from across ethnic minority groups and young people. These gaps were addressed by arranging and facilitating focus group discussions. Focus group participants were recruited specifically from these under-represented groups, with a view to drawing out particular stories or narratives that reside with those audiences. In doing so, this would help identify any socio-demographic variations (referred to as ‘focus group’ data).

1.9 As part of the phase two visioning approach, capturing the views of small business owners or managers, including farmers, was considered a potential gap. NRW was keen to ensure that the research gathered perspectives from people whose businesses might be directly impacted by the climate and nature emergencies and so small businesses and farmers were included as a third target group within phase two.

1.10 Finally, the nine statements were tested with respondents who had already engaged in the national conversation held during phase one of Nature and Us and had given their permission for NRW to contact them again. This was carried out through an online survey that mirrored the content of the questionnaire that was used during the phase two roadshows. This group would act effectively as a control group to help clarify that their visions of the future has been interpreted correctly within the phase one analysis.

The key objectives of the second phase research

1.11 The objectives of this second phase of the research were to:

- test whether phase one respondents agree with the interpretation of the phase one involvement exercise findings i.e., whether the nine statements reflect the views set out by respondents when asked to describe their life in 2050



- test whether under-represented groups agree with the phase one involvement exercise findings and priority themes
- identify common barriers and motivators for different futures
- understand which statements people most or least agree with, and why.
- help understand and acknowledge where the greatest areas of contention and consensus lie within and between the different cohorts
- collect narratives and personal experiences initiated by the nine statements to help shape the vision.

Structure of report

1.12 This report is presented in six chapters as follows:

- chapter one: this introduction to the report
- chapter two: outlines the second phase study methodology and profile of contributors
- chapter three: sets out the quantitative data gathered over the course of the research in relation to the nine key statements
- chapter four: considers in more detail survey respondents' views on each of the key statements
- chapter five: considers other issues raised by survey respondents
- chapter six: discusses the key findings from focus group discussions
- chapter seven: presents our reflections on the study findings and sets out some considerations for the future.

1.13 Annex A sets out the research instruments deployed.



2. Methodology

2.1 This chapter summarises the method adopted for undertaking the second phase research and the profile of contributors.

Method

2.2 The research, undertaken between July and November 2022, involved the following elements of work:

Inception

2.3 The research team attended an inception meeting with NRW staff and developed a research methodology.

2.4 This stage also involved preparing a survey tool and a focus group discussion guide, set out at Annex A of this report. The survey tool asked respondents to:

- score each of the nine statements using a Likert scale on a scale of 1 to 5 (with 1 being you would not at all want to live like that and 5 being you would definitely want to live like that).
- think about the future and what they felt could be possible, to select one of the statements which most describes how they would like to live and explain why that was the case, drawing on personal experience
- select which statement least describes how they would like to live and why that was the case, drawing on personal experience.

Survey fieldwork

2.5 A total of 591 survey responses was secured. The survey was completed by:

- **roadshow respondents:** who were in attendance at six events held across those areas identified during phase one as being geographic gap areas. 286 surveys were completed during the roadshow, held between July and September 2022. These were events attended by researchers who either asked attendees to complete the survey using iPads or completed a hard copy survey and used the online survey tool to upload the responses



- **online respondents:** who had previously engaged with the first phase of the national conversation, and 305 surveys were completed by this cohort. An invitation to complete an online survey was emailed by NRW to 3,069 individuals on the 6th of September 2022.

2.6 The survey data was analysed by:

- preparing data tabulations for all closed survey questions and preparing a bespoke analysis template in Excel and importing the content of survey qualitative responses into this template
- undertaking an initial review of a sample of responses to each of the qualitative questions and developing a coding framework for analysing responses relevant to each of the nine statements. A random sample of responses to each question was selected to ensure that a different set of responses were considered for each. The coding framework allowed for the identification of common codes for labelling key issues across statements and was used as an overarching framework for thematic analysis
- using the coding framework to categorise all qualitative survey responses received, ensuring that the analysis was undertaken in a consistent manner without bias. New themes identified during this exercise were added to the coding framework
- analysing the responses to each of the qualitative questions and developing a narrative around each of the nine statements set out within the survey
- undertaking a secondary analysis, via another researcher, of at least 10 per cent of all coding and analysis undertaken to ensure that no bias was adopted.

Qualitative fieldwork

2.7 Following the analysis of phase one findings, particularly those from the online survey where respondents were asked to complete a number of geo-demographic questions, Freshwater set out to recruit contributors to a total of 18 focus groups.



The aim was to recruit contributors from communities that were under-represented in the original phase one survey, specifically:

- ethnic minority communities (six groups)
- young people (six groups)
- small business owners/managers (four groups)
- farming communities (two groups).

2.8 The preference was to convene face-to-face meetings to encourage greater levels of engagement and allow for slightly larger groups. Recruitment was undertaken via existing stakeholder organisations and/or groups that already met regularly. It was felt that this approach would allow facilitators to run the discussions in surroundings that contributors were most comfortable with. It was also agreed to reward all focus group participants with a £15 retail voucher as a 'Thank You' for their participation.

2.9 A total of 16 focus groups sessions were successfully delivered (11 in-person and five virtual ones) and attended by a total of 157 contributors. Their recruitment and profile was as follows:

- ethnic minority groups were all convened in partnership with different community organisations that volunteered to host a focus group. Five groups were held in person, and one was held virtually. NRW agreed to meet a number of reasonable expenses claims from community groups that volunteered to host these groups
- young people were recruited from a combination of schools, Further Education (FE) colleges, the Welsh Youth Parliament and a Young Persons' Forum, run by the network of Wildlife Trusts in Wales. The four college groups were held in person, with the other two held virtually to allow for pan-Wales participation
- the small business groups were initially organised as in-person groups at four identified venues across Wales. Recruitment was undertaken via email and social media, in partnership with the Federation of Small Businesses (FSB) (Cymru) and via NRW's own social media channels. In response to low



numbers of volunteers and direct requests from prospective respondents for in-person focus groups, the four sessions were cancelled and replaced with two online focus groups

- the two farming groups were held as in-person sessions during the 2022 Royal Welsh Show, one in partnership with the two main farmers unions (National Farmers Union and Farmers Union of Wales) and a second with the Wales Federation of Young Farmers' Clubs.

2.10 Participants at in-person focus groups were also asked to score each of the nine statements on a scale of 1 to 5 (with 1 being you would not at all want to live like that and 5 being you would definitely want to live like that) and the data was aggregated and analysed as part of the study.

2.11 A write up of each focus group session was drafted and a thematic analysis by target audience was undertaken by a member of the research team. This involved identifying the most and least commonly preferred statements by each target group (ethnic minorities, young people, farming community and business community) and drawing out the main reasons and motivators for their selection. In addition, an analysis of common barriers, motivators and influencers was undertaken across target groups.

Preparation of research report

2.12 The findings of the fieldwork was analysed, and this report was drafted. The report has also been subject to a rigorous peer review by a member of the research team.

Methodological considerations and limitations

Survey considerations

2.13 It was intended that the cohort of survey respondents would be drawn fairly equally from those attending roadshows and those responding to the online survey in order to provide a fair comparison of views. In the event, a fairly equal split was achieved (48% being from the roadshow cohort and 52% from the online cohort) which allows for findings from both cohorts to be compared.



2.14 The qualitative feedback gleaned from roadshow respondents to the open ended questions is very limited. By comparison, much more detailed and thoughtful responses were secured to open ended questions via the online survey. As a result, this analysis draws heavily upon the open ended responses provided by online survey respondents.

2.15 An analysis of the survey data shows that there are some discrepancies in how respondents have answered the questions. For instance, it does not always follow that a respondents' highest ranked statement is then selected as their most preferred option and likewise, not all respondents have selected their lowest ranked statement as their least preferred option. This is particularly evident amongst the roadshow survey responses, and responses relating to Statement 3 (Using energy) shows the greatest degree of inconsistency. A number of factors could account for this, including:

- confusion around what number related to the most or least likely option (i.e., taken 1 as the most likely and 5 as the least likely), which might account for some of the discrepancies and there is evidence that this has happened in a small number of cases, particularly across the green spaces statement. For instance, four of nine open-ended responses to explain why a survey respondent had selected green spaces as their least preferred statement were in fact positive responses. A broader examination of the quantitative data however does not reveal any specific pattern to these inconsistencies i.e., the inconsistencies are evident across all, not just one or two, statements
- feedback gathered by roadshow facilitators suggests that some of the statements were considered complicated and difficult to understand. Some of the open ended survey responses support this view:

'The questions are so wide that they are impossible to answer with any accuracy. Each question have a number of sub questions, some of which I agree with and some not.'

'They are loaded with too many options for the answers to be accurate'



- an analysis of open ended comments⁴ would also suggest that in some cases, survey respondents who gave a statement a low rating have deliberately chosen the same statement as their preferred statement because they wish to see a dramatic change take place across this area. This is the case across the ‘travelling around’ statement where survey respondents have argued that poor public transport explains their low score, but they wish to see a marked improvement to this provision.

2.16 It is very likely therefore that a number of factors contributed to the inconsistencies found within the data. Inconsistencies are most evident amongst roadshow survey responses, who were asked to complete the survey at events where they might have been restricted by time and had other activities to undertake.

Focus groups considerations

- 2.17 It proved challenging for several participants within one focus group to participate in the discussion, due to language barriers on their part. Simultaneous translation and interpretation support was offered to the group, but this was not considered necessary by the organisation who convened the group on behalf of the research team. In this case, the questions asked were kept brief and it was not possible to cover the discussion guide in full with the group. Nonetheless, key issues were raised by participants, and they have been reflected in this analysis.
- 2.18 Although 45 individuals attended the two business focus groups, in reality the contribution was limited to 10 people, as the majority did not contribute to the digital discussions. In most cases, contributors considered the statements from a personal rather than a business perspective. Therefore, the views of the business sector is limited within this analysis.
- 2.19 Six focus groups were held with young people. Of these, three were held in a further education college and one in a school with pupils aged 11-15. Another group was held with a more environmentally engaged cohort in that they were either already working or volunteering in the environment sector. The findings from this group

⁴ See Annex A for the survey tool used. Survey respondents were asked why they had chosen their most and least preferred statement.



were slightly different to the other young people focus groups, in that they were better informed about the issues and drew upon their experiences of working in this area.

Profile of contributors

Profile of survey respondents

- 2.20 A total of 591 individuals completed either the online (305 respondents) or roadshow survey (286 respondents).
- 2.21 All roadshow surveys were completed in English whilst five of the 305 online surveys were completed in Welsh.

Profile of focus group contributors

- 2.22 A total of 16 focus groups were held between July and November 2022 with 157 participants in attendance. Of these:
- six focus groups were facilitated with 51 young people, including three sessions at further education colleges and one session with secondary school pupils
 - five focus groups were facilitated with 47 ethnic minority participants, refugees, and asylum seekers
 - two focus groups were facilitated with 14 members of the farming community (this includes one group of young people, whose views have been analysed as part of the farming community)
 - two focus groups were facilitated with 45 representatives from the business community.



3. Future statements about the natural environment

Introduction

- 3.1 This chapter sets out the quantitative data gathered over the course of the fieldwork. It considers the survey data gathered from 286 individuals who participated in the roadshow survey and 305 who completed the online survey, as well as the qualitative focus group data, drawing on the responses of 98 focus group contributors who participated in in-person discussions.

How people want to live in the future

Roadshow survey respondents

- 3.2 Roadshow survey respondents were broadly supportive of the changes set out across all nine statements in that the majority of them wanted to live in the way described by the statements in the future, at least to some extent. Overall, the scores given by roadshow survey respondents to each statement were fairly well spread out from not at all (a score of 1) through to definitely (a score of 5). The statements given scores of 4 or 5 most frequently by roadshow survey respondents (and therefore suggesting respondents would most like to live like this in the future) were those relating to green spaces, followed by shopping for things, staycation and recycling. The statements given scores of 1 or 2 most frequently by roadshow survey respondents (and therefore suggesting respondents least want to live like this in the future), were those about using energy, travelling around, and woodlands. This is set out at Table 3.1 and Figure 3.1.



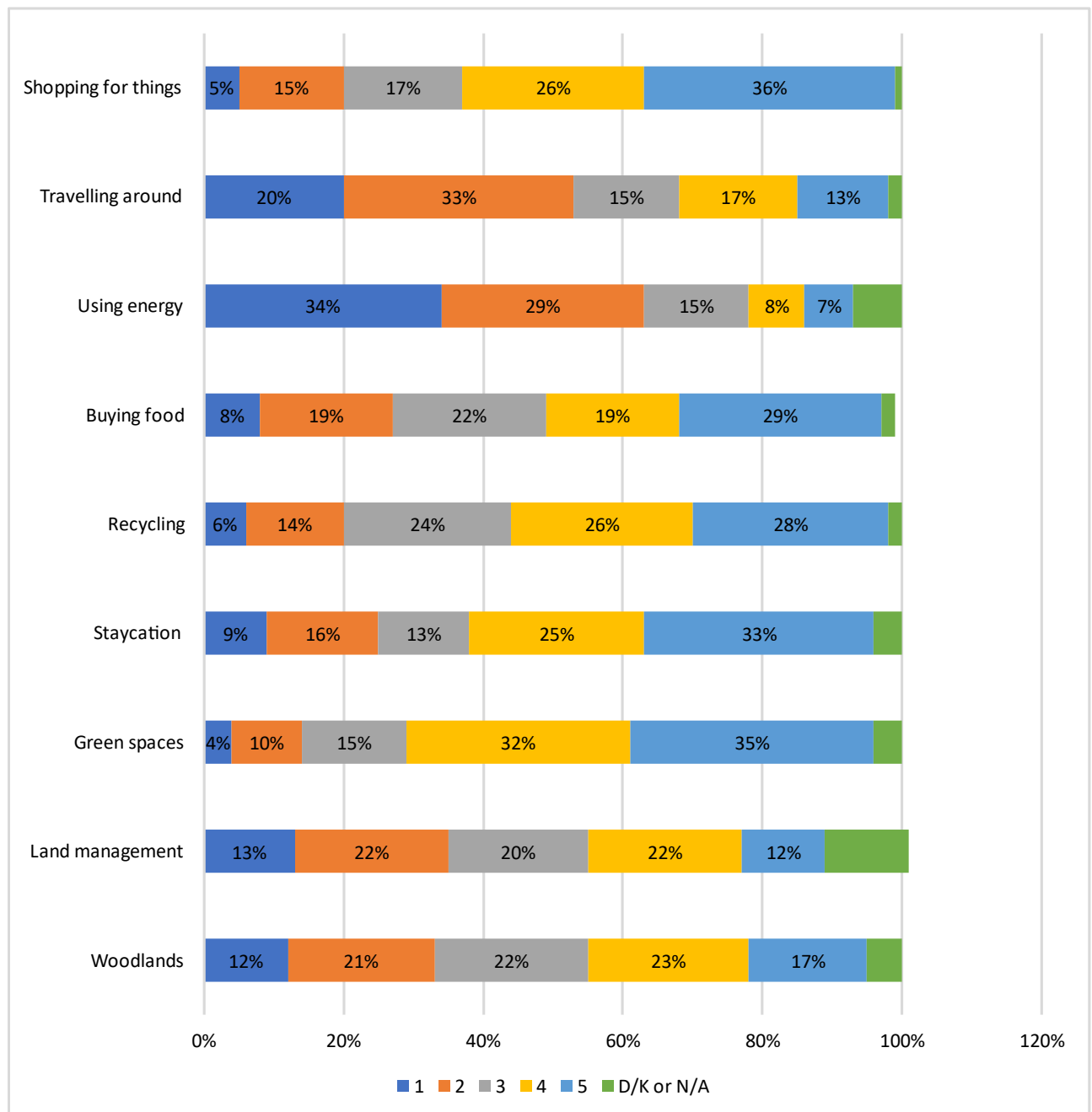
Table 3.1: Roadshow survey respondents' preferences of wanting to live in the way described by each statement in the future

%	Not at all 1	A bit 2	Quite a bit 3	Quite a lot 4	Definitely 5	D/K or not answered
Shopping for things	5%	15%	17%	26%	36%	1%
Travelling around	20%	33%	15%	17%	13%	2%
Using energy	34%	29%	15%	8%	7%	7%
Buying food	8%	19%	22%	19%	29%	2%
Recycling	6%	14%	24%	26%	28%	2%
Staycation	9%	16%	13%	25%	33%	4%
Green spaces	4%	10%	15%	32%	35%	4%
Land management	13%	22%	20%	22%	12%	12%
Woodlands	12%	21%	22%	23%	17%	5%

Source: Nature and Us roadshow survey (286 respondents)



Figure 3.1: Roadshow survey respondents' preferences of wanting to live in the way described by each statement in the future (with 1 being not at all and 5 being definitely)⁵



Source: Nature and Us roadshow survey (286 respondents)

⁵ Due to rounding proportions do not always tally to 100%



Online survey respondents

3.3 Online survey respondents were very supportive of the changes set out across all nine statements in that the majority of them wanted to live in the way described by the statements in the future. The statements given scores of 4 or 5 most frequently by online survey respondents (and therefore suggesting respondents would most like to live like this in the future) were those relating to green spaces, buying food, recycling, and woodlands. As shown at Table 3.2, 80% and over of online survey respondents gave these four statements a score of 4 or 5. The statements given scores of 1 or 2 most frequently by online survey respondents (and therefore suggesting respondents least want to live like this in the future), were those about travelling around and staycation albeit less than a quarter of online survey respondents gave these two statements a score of 1 or 2. This is set out at Table 3.2 and Figure 3.2.

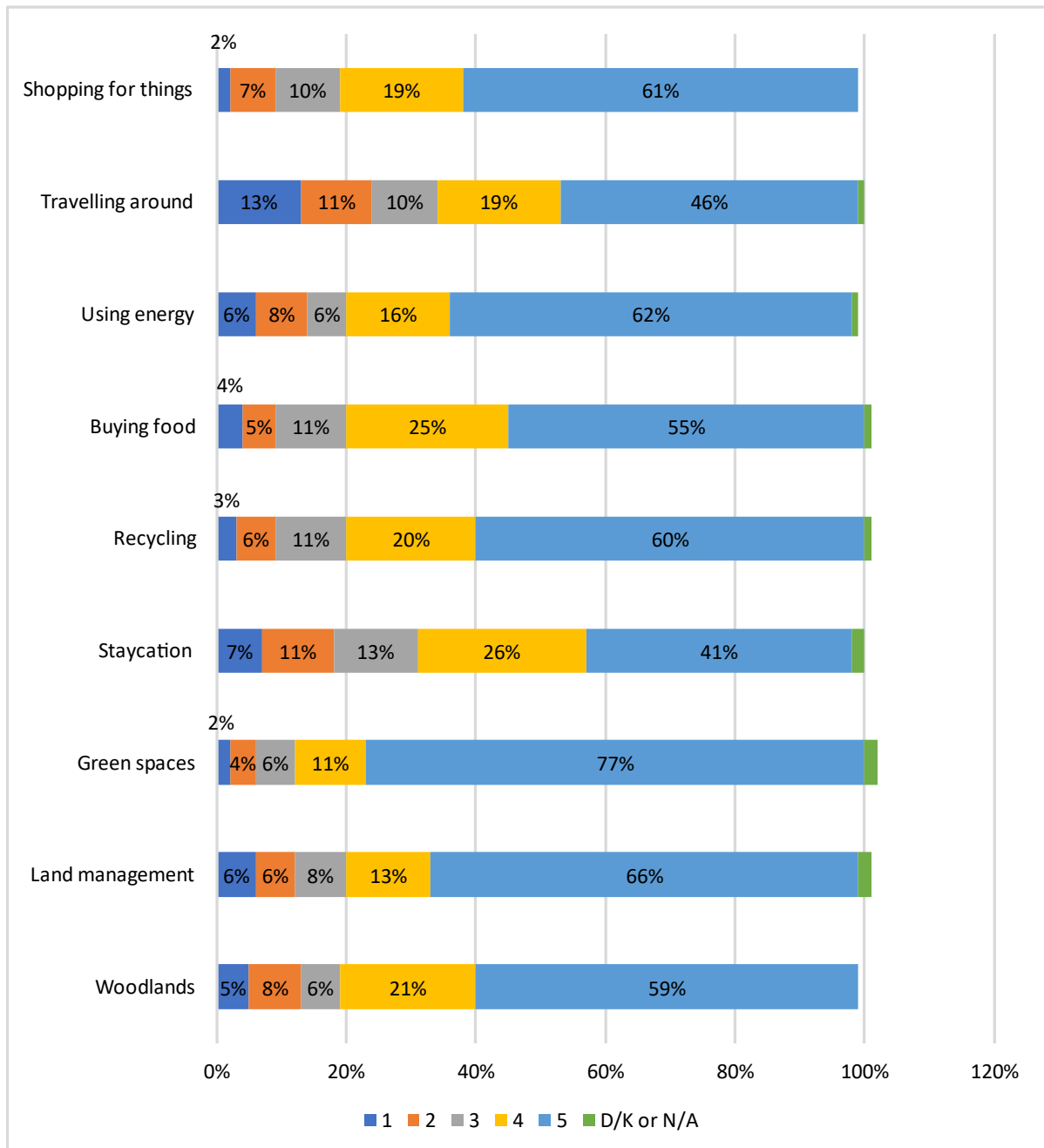
Table 3.2: Online survey respondents' preferences of wanting to live in the way described by each statement in the future

%	Not at all 1	A bit 2	Quite a bit 3	Quite a lot 4	Definitely 5	D/K or not answered
Shopping for things	2%	7%	10%	19%	61%	0%
Travelling around	13%	11%	10%	19%	46%	1%
Using energy	6%	8%	6%	16%	62%	1%
Buying food	4%	5%	11%	25%	55%	1%
Recycling	3%	6%	11%	20%	60%	1%
Staycation	7%	11%	13%	26%	41%	2%
Green spaces	2%	4%	6%	11%	77%	0%
Land management	6%	6%	8%	13%	66%	2%
Woodlands	5%	8%	6%	21%	59%	0%

Source: Nature and Us online survey (305 respondents)



Figure 3.2: Online survey respondents' preferences of wanting to live in the way described by each statement in the future (with 1 being not at all and 5 being definitely)⁶



Source: Nature and Us online survey (305 respondents)

⁶ Due to rounding proportions do not always tally to 100%



Focus group participants

3.4 Focus group participants were also supportive of the changes set out across all nine statements in that the majority of them wanted to live in the way described by the statements in the future. The three statements given scores of 4 or 5 most frequently by focus group participants (and therefore suggesting that they would most like to live like this in the future) were recycling, green spaces, and shopping. The statements given scores of 1 or 2 most frequently by focus group participants (and therefore suggesting that they least want to live like this in the future) were staycation, using energy and travelling around. The data are set out at Table 3.3 and Figure 3.3.

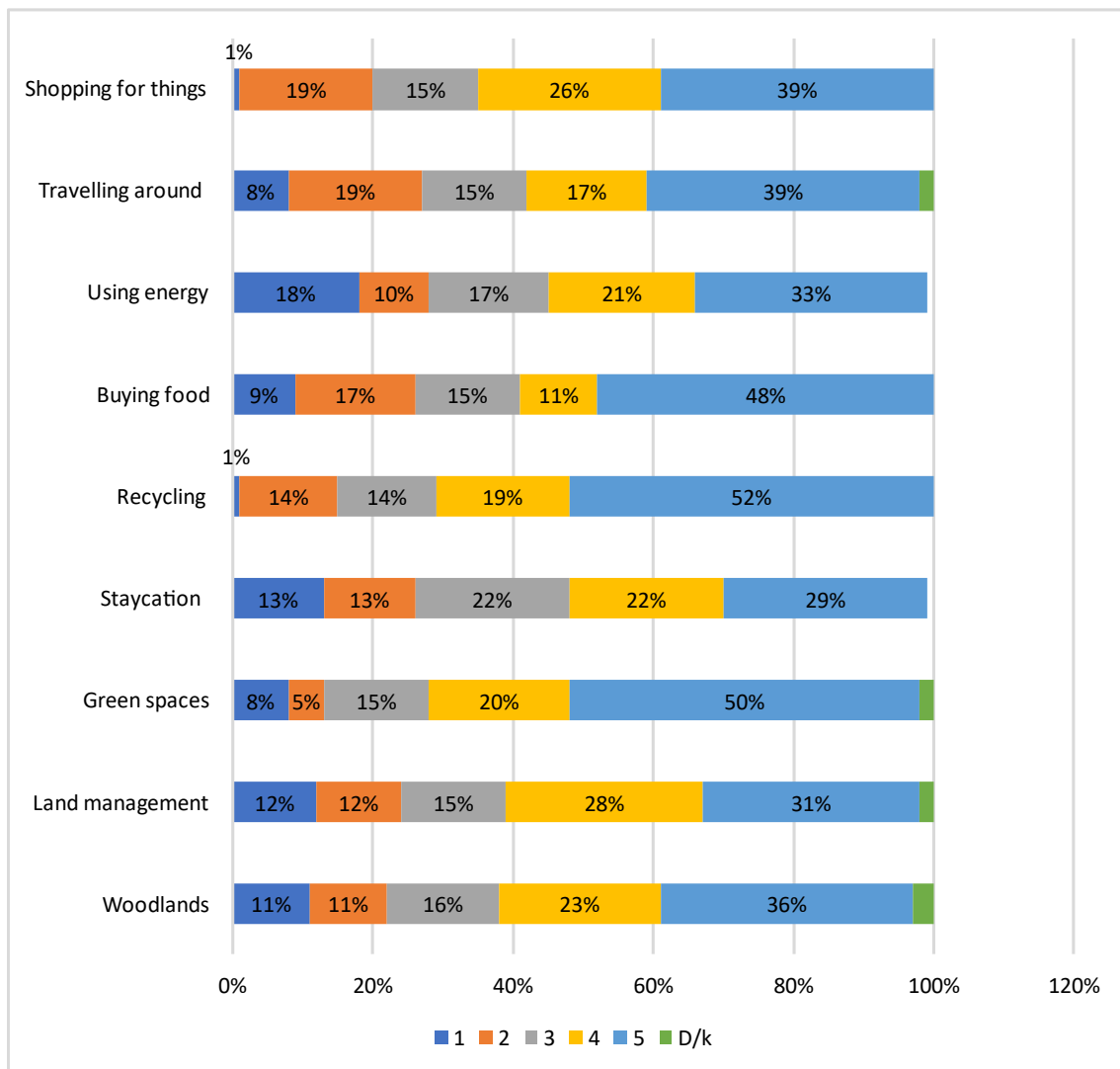
Table 3.3: Focus group participants’ preferences of wanting to live in the way described by each statement in the future

%	Not at all 1	A bit 2	Quite a bit 3	Quite a lot 4	Definitely 5	D/K or not answered
Shopping for things	1%	19%	15%	26%	39%	0%
Travelling around	8%	19%	15%	17%	39%	2%
Using energy	18%	10%	17%	21%	33%	0%
Buying food	9%	17%	15%	11%	48%	0%
Recycling	1%	14%	14%	19%	52%	0%
Staycation	13%	13%	22%	22%	29%	0%
Green spaces	8%	5%	15%	20%	50%	2%
Land management	12%	12%	15%	28%	31%	2%
Woodlands	11%	11%	16%	23%	36%	3%

Source: OB3 in-person focus groups (98 participants)



Figure 3.3: Focus group participants' preferences of wanting to live in the way described by each statement in the future (with 1 being not at all and 5 being definitely)⁷



Source: OB3 in-person focus groups (98 participants)

Analysis by statement

3.5 Some important messages emerge when analysing each of these individual statements by cohort, as the scores provided by roadshow survey respondents, online survey respondents and focus group participants do differ. The nine charts set out in Figure 3.4 (a to i) illustrate the differences in opinion about the extent to

⁷ Due to rounding proportions do not always tally to 100%



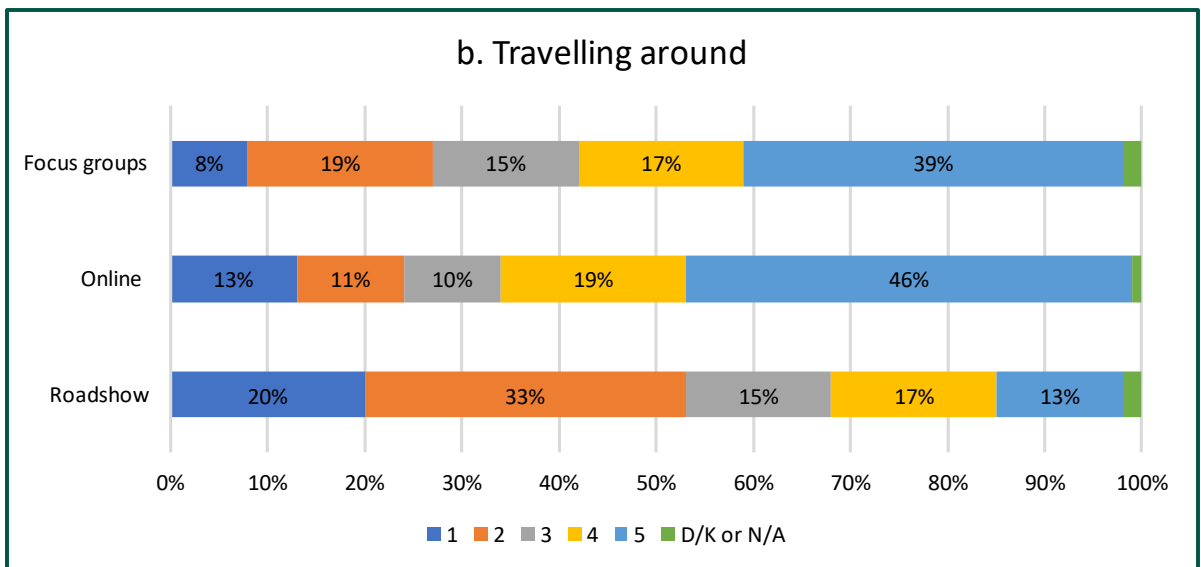
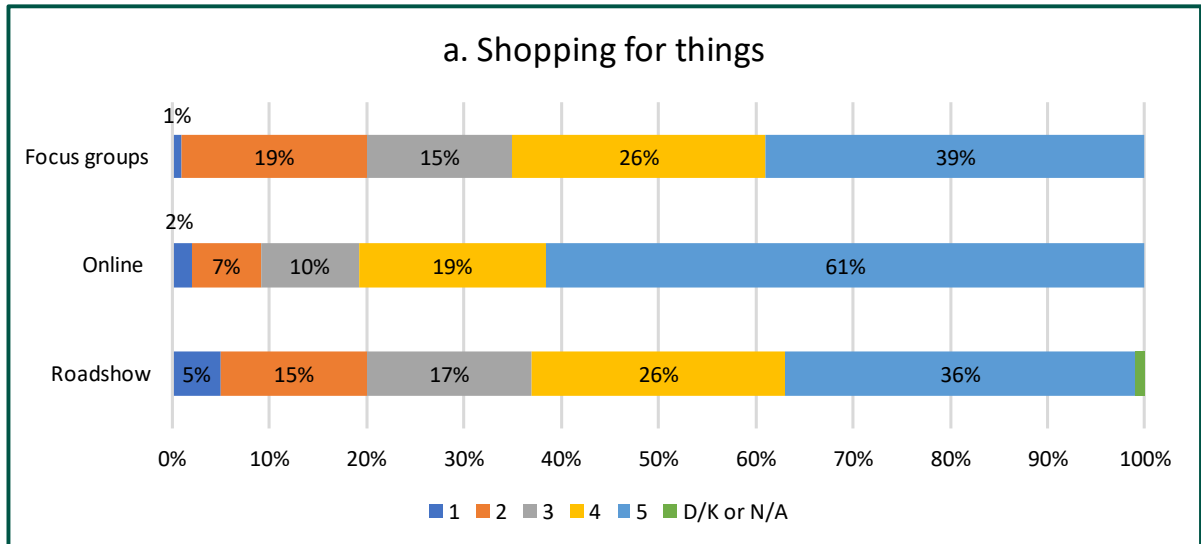
which these three cohorts want to live like the nine statements. Overall, these charts in Figure 3.4 show that:

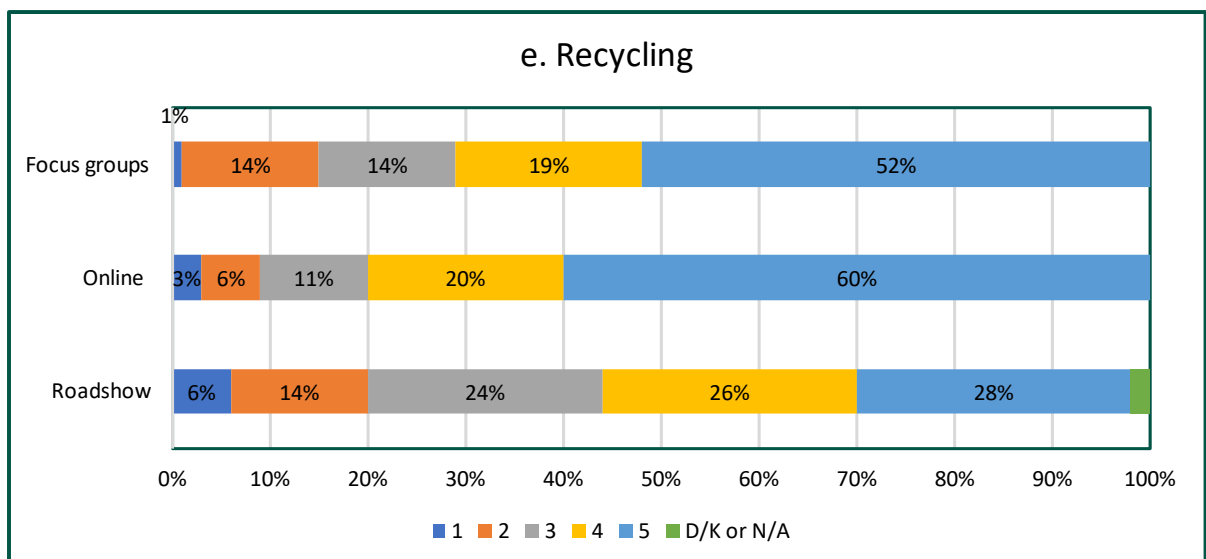
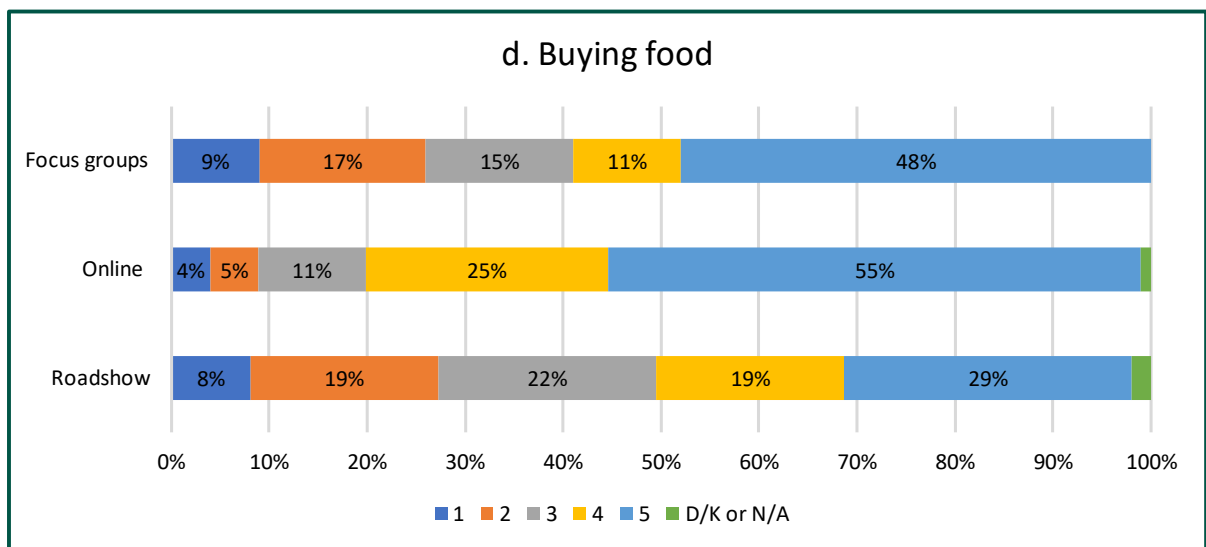
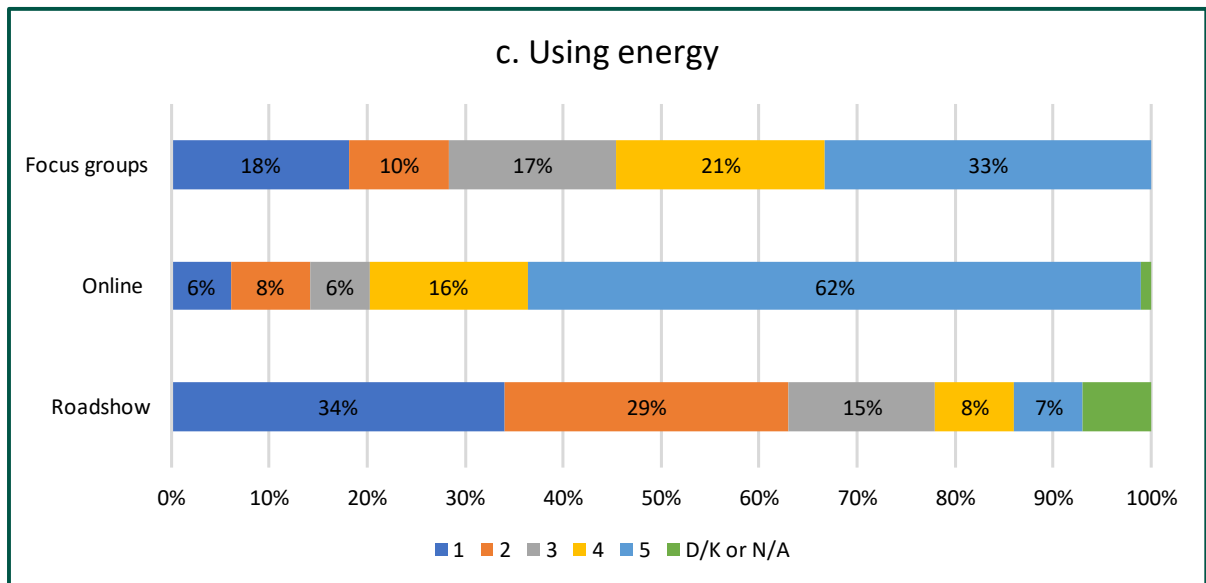
- online survey respondents were much more likely to score every statement higher (i.e., a score of 4 or 5) than both roadshow survey respondents and focus group participants (Figure 3.4 a to i).
- both roadshow survey respondents and focus group participants were more likely to score every statement lower (i.e., a score of 1 or 2) than online survey respondents (Figure 3.4 a to i). The only exception to this was for the staycation statement (Figure 3.4f), where the three cohort provided scores which were broadly similar.
- overall, the scores given by roadshow survey respondents and focus group participants were broadly similar. The exceptions were that focus group participants expressed greater preference for the recycling (Figure 3.4e), land management (Figure 3.4h), woodlands (Figure 3.4i) and using energy statements (Figure 3.4c).
- the statement with the largest difference in scores between online survey respondents and roadshow survey respondents⁸ was the using energy statement (Figure 3.4c), followed by the two statements on land management (Figure 3.4h) and woodlands (Figure 3.4i).

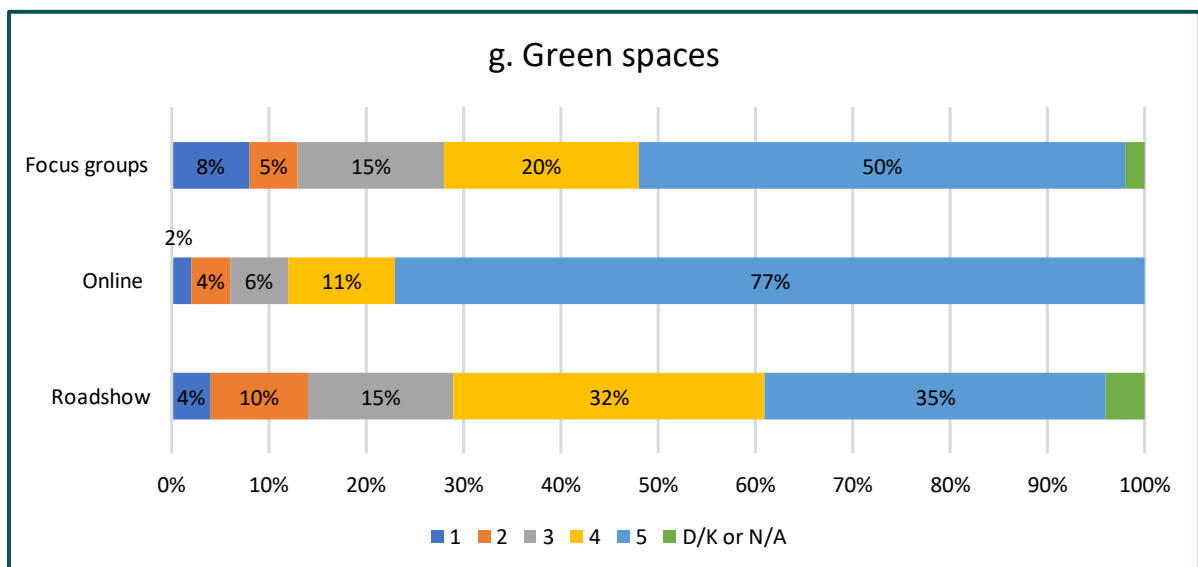
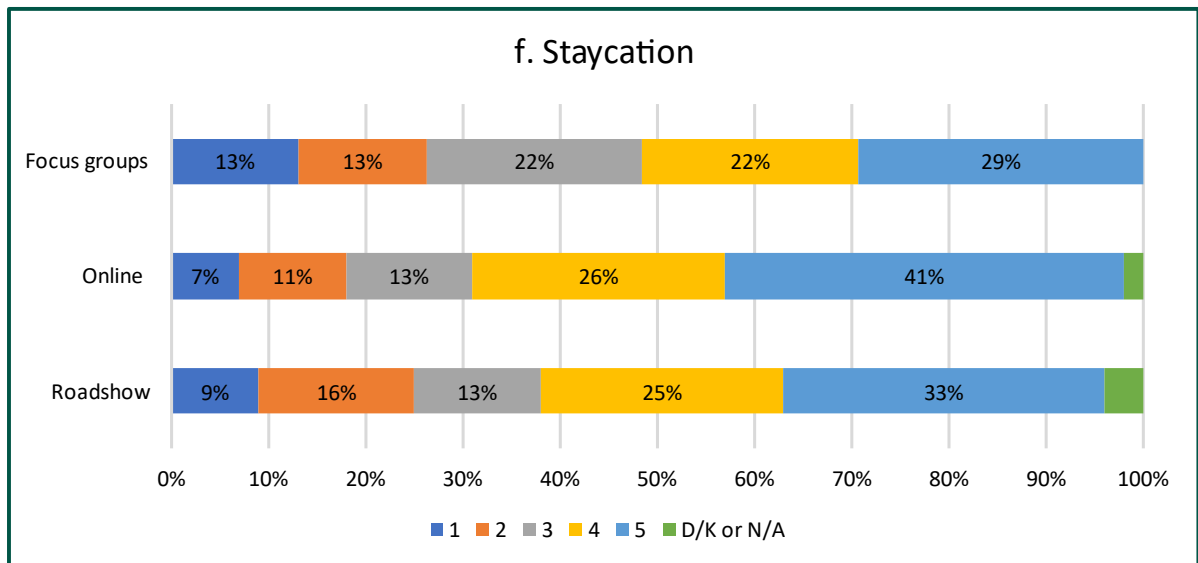
⁸ Measured by the difference between those who scored each statement a 4 or 5

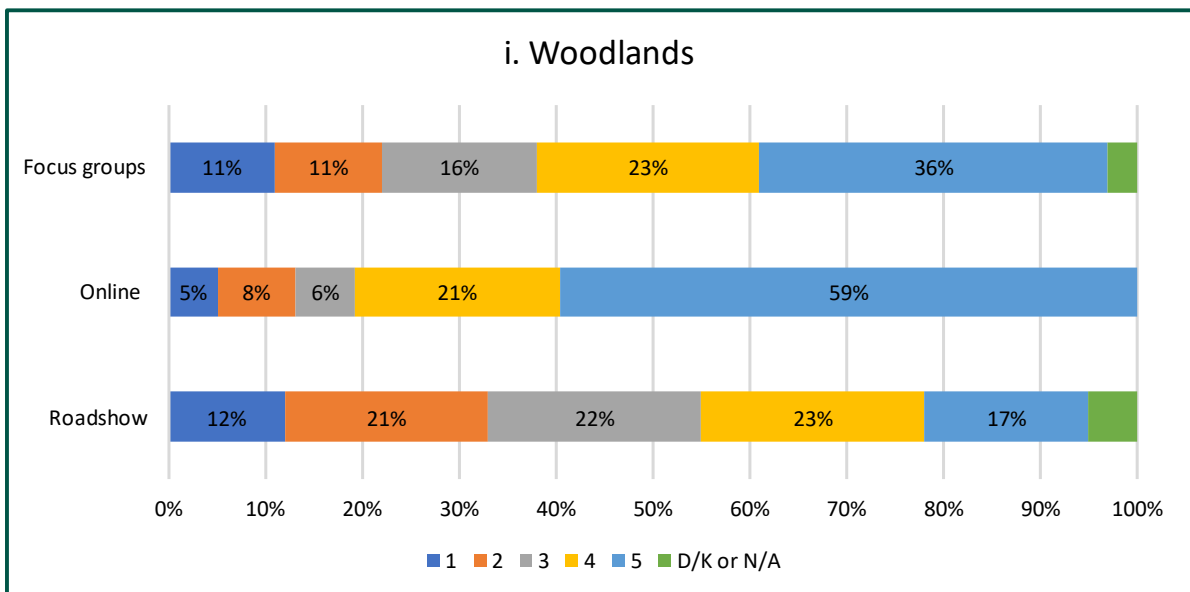
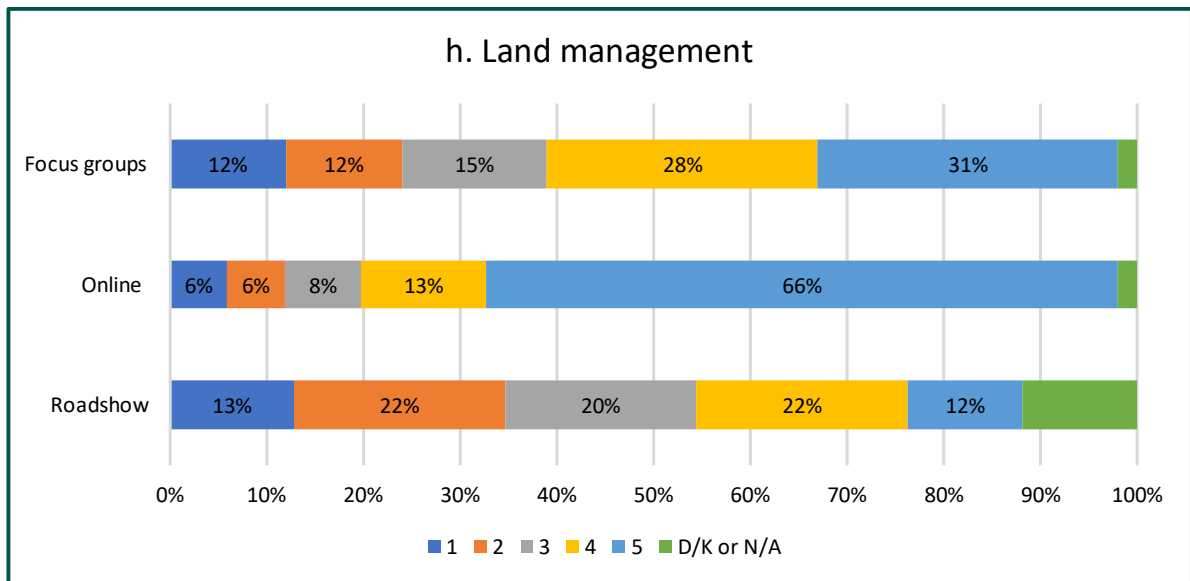


Figure 3.4a-i Contributor's preferences of wanting to live in the way described by each statement in the future (with 1 being not at all and 5 being definitely)









Source: Nature and Us survey (286 roadshow survey respondents, 305 online survey respondents) and focus group participants (98 respondents)

Preferred statement

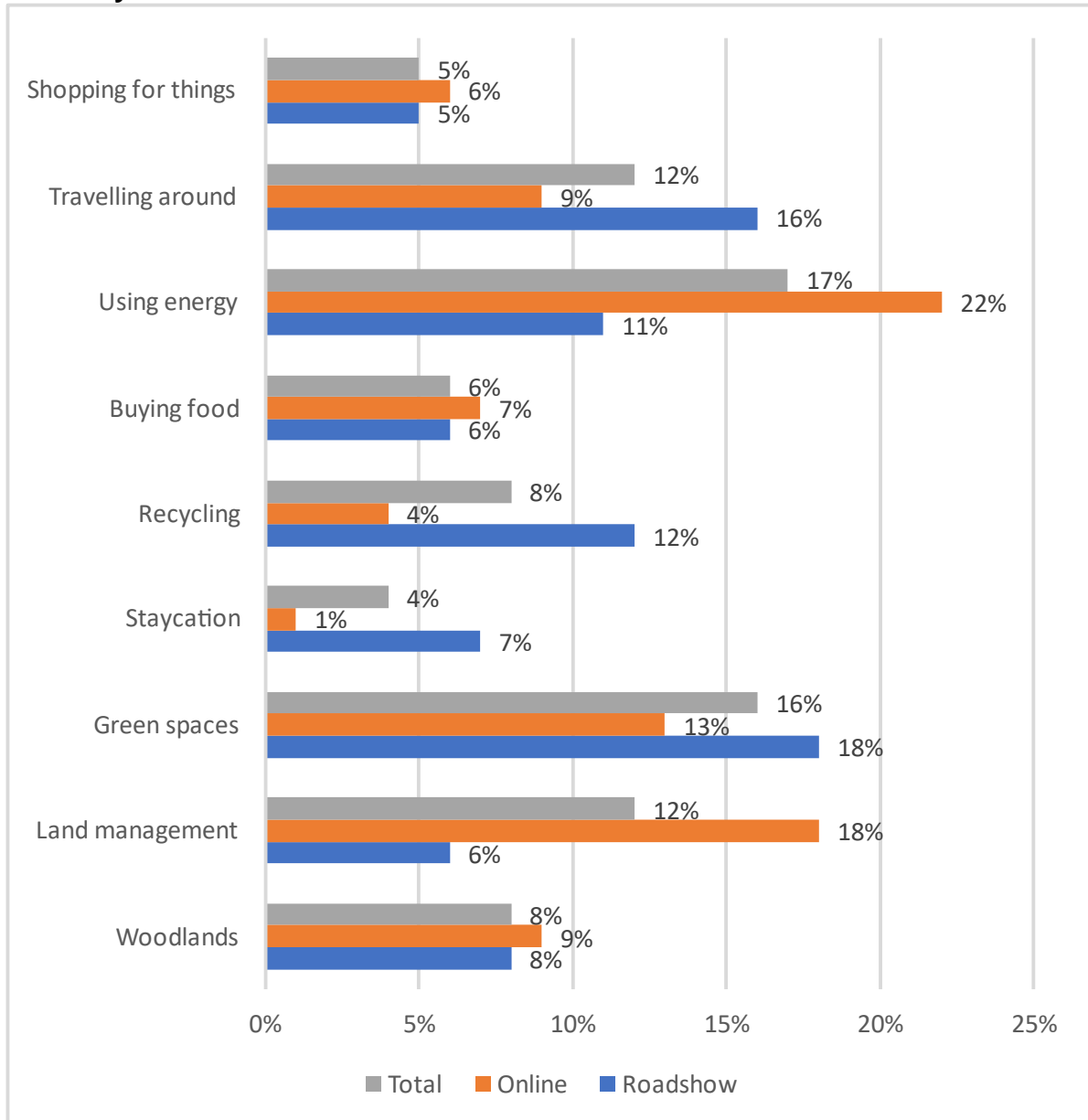
- 3.6 All survey respondents were asked to select one of the nine statements which most describes how they would like to live as described by the statements in the future. The findings are set out in Table 3.4 and Figure 3.5. Overall, survey respondents chose the following two statements: using energy (17%) and green spaces (16%), as ones which they thought most described how they would like to live in the future. Online survey respondents chose the two statements focused on using energy



(22%) and land management (18%) whilst roadshow respondents selected green spaces (18%) and travelling around (16%) as their preferred statement. The greatest difference in opinion about preferred statement between online and roadshow respondents was in relation to land management and using energy.



Figure 3.5: The statement which survey respondents said most described how they would like to live in the future



Source: Nature and Us surveys (286 roadshow respondents, 305 online survey respondents, 591 respondents in total)

Least preferred statement

3.7 Survey respondents were asked to select the statement which they thought least described how they would like to live in the future (set out at Table 3.5 and Figure 3.6). The statements which were cited the most frequently were staycation (16%), followed by travelling around (12%) and shopping for things (11%). It is notable that



a third of all survey respondents (34%) either did not know or did not answer this question. Online respondents selected staycation (23%) and traveling around (16%) as their least preferred statements, whilst roadshow respondents cited shopping for things (13%) followed by using energy (11%).

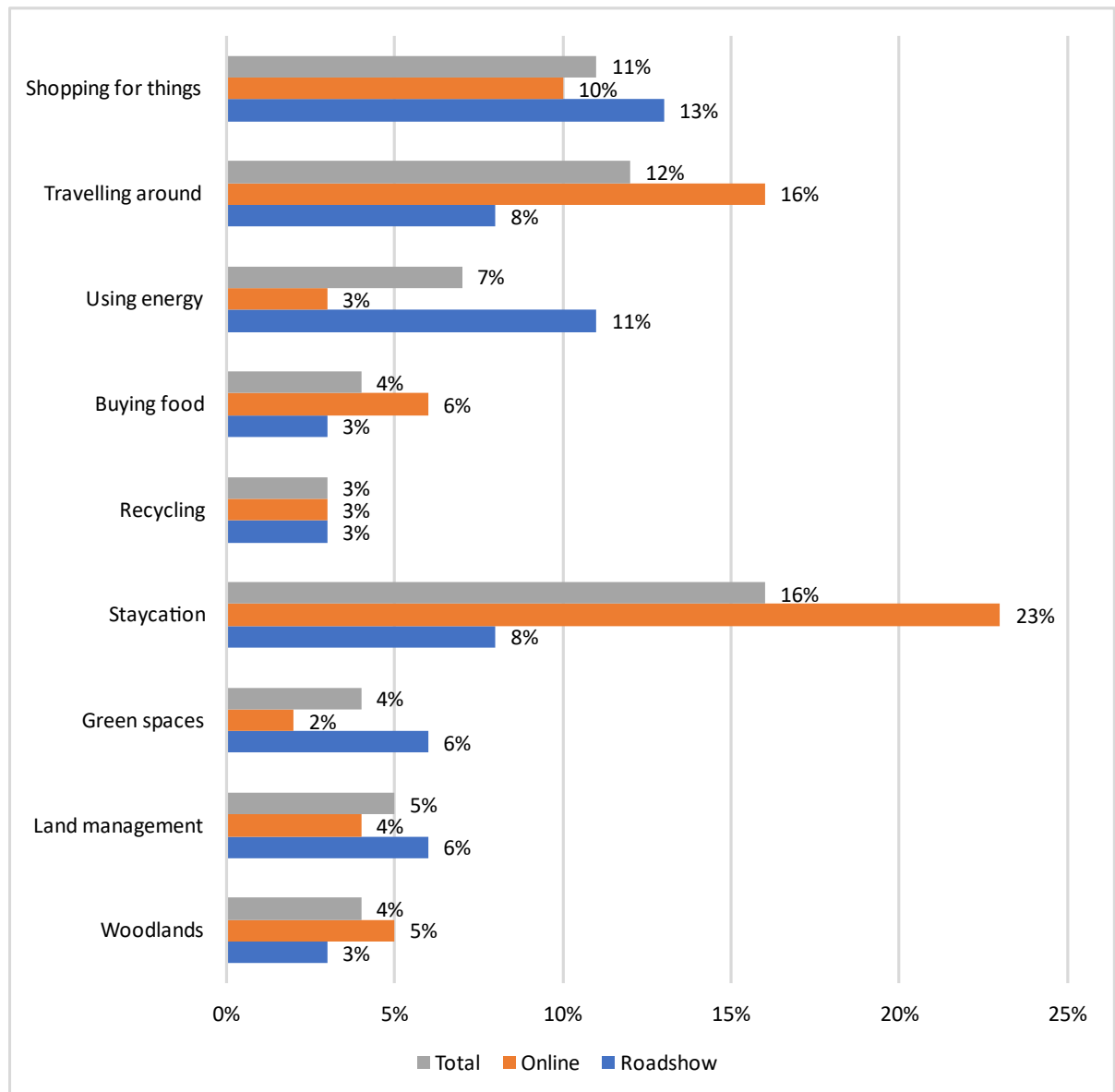
Table 3.5: The statement which survey respondents said least described how they would like to live in the future

	Roadshow	Online	Total
Shopping for things	13%	10%	11%
Travelling around	8%	16%	12%
Using energy	11%	3%	7%
Buying food	3%	6%	4%
Recycling	3%	3%	3%
Staycation	8%	23%	16%
Green spaces	6%	2%	4%
Land management	6%	4%	5%
Woodlands	3%	5%	4%
D/K or not answered	38%	30%	34%
Total	286	305	591

Source: Nature and Us survey (591 respondents)



Figure 3.6: The statement which survey respondents said least described how they would like to live in the future



Source: Nature and Us survey (286 roadshow respondents, 305 online survey respondents, 591 respondents in total)



4. Survey respondents' feedback on the future statements

Introduction

- 4.1 This chapter sets out the feedback captured via the roadshow and online surveys about each of the nine future statements. Each statement is discussed in turn.
- 4.2 Over half, (157 of the 286 or 55%) roadshow respondents provided a reason for their selected preferred statement and just over a third (102 of the 286 or 36%) of roadshow respondents provided a reason for their least preferred statement. A large majority (252 of the 305 or 83%) of online survey respondents provided a reason for their selected preferred statement and three-quarters (229 of the 305 or 75%) of online survey respondents provided a reason for their least preferred statement.

Shopping for things

I am thoughtful about the clothes, food, and household goods I buy. I try to look for things that last longer and can be repaired. I choose local products or things that are recycled or second hand. I do this as it is easy to find local people who will mend broken things, and it reduces the amount of resources I am using

- 4.3 In all, 21 survey respondents who had chosen this statement (shopping for things) as their top preferred statement and 46 who had chosen it as their least preferred one, provided a reason for doing so.

Reasons for choosing shopping for things as most preferred statement

- 4.4 Seven of the 21 survey respondents (or 33%) that had chosen shopping for things as their preferred statement felt that consumerism and capitalism had many negative environmental impacts:

“Consumption and capitalism is a vast cause of toxic nature / human relations.”



- 4.5 One respondent suggested that reducing consumerism, and stigmatising it, was necessary:

“Because we are too consumer driven at the moment. We should try and get over-consumption stigmatised in the way that smoking now is. People would be ashamed of buying consumer goods unless there is a need.”

- 4.6 Others had chosen this as their preferred statement as they either liked shopping or already adopted elements of sustainable shopping in their lives – and because it was something they themselves could control, to an extent:

“I already think about clothes, food and household goods, whereas some of the other options are not so easy for me to imagine becoming a reality.”

“I feel that how we spend our money on stuff has one of the largest environmental impacts as our house and energy are already there.”

- 4.7 The need for more durable goods was also mentioned:

“...at the moment things seem designed to break down/wear out really quickly which I find very frustrating, it is one of my pet hates.”

“I would like to have more products that are long lasting locally sourced, so I don’t need to buy excessively.”

- 4.8 Respondents pointed out that purchasing decisions come into play across many of the other statements too, and finally, local resilience was mentioned as a reason for favouring this statement:

“All of the above are important but keeping a healthy local economy which provides what people need close to home is essential to give resilience in an area. We have to be mindful about how we use resources and recent global events have shown how easily economies can be wrecked without local resilience.”

Reasons for choosing shopping for things as least preferred statement

- 4.9 A quarter of respondents (13 of 46 responses, or 28%) who had chosen shopping for things as their least preferred statement and had provided a qualitative response, explained that it was chosen for personal reasons - they didn’t like shopping, or because it was not a big part of their lifestyle. One respondent explained:



“This is not a lifestyle choice I have ever considered, and naturally falls below the other options as a result.”

- 4.10 A few respondents emphasised the low availability of some goods locally and the importance of personal freedom:

“I have bought clothing from a charity shop, and I am happy to have goods repaired but I think I would want to be able to have the choice to buy new things when I wanted.”

“Quite rural so this will always be a challenge.”

“We need to have choice and not be insular in our approach to shopping. You can’t always get what you need locally.”

- 4.11 Another survey respondent felt that the last clause of the statement was over-ambitious in terms of human behaviour:

“The final part of this statement is the bit that concerns me, it depends on people becoming more self-sufficient and looking to ‘make do and mend’ as my parents did most of their lives, I’m not sure if such a turn round in people’s outlook on life is possible in that amount of time.”

Travelling around

I walk, cycle, or take public transport a lot more now when I need to travel. The transport system is flexible, so it can be used by people with different mobility needs. There are plenty of facilities for electric car charging and for car-sharing. The options and choices are so widespread and connected, fewer people use their own cars for shorter trips now and the air is cleaner

- 4.12 A total of 46 survey respondents who had chosen travelling around as their preferred statement and 54 survey respondents who had chosen travelling around as their least preferred statement, provided an explanation for their selection.

Reasons for choosing travelling around as most preferred statement

- 4.13 The 46 survey respondents who had chosen travelling around as their top preferred statement had chosen it for two main reasons:



- the public transport structure in Wales was seen as inefficient and unreliable, and not suited to the needs of people (13 of 46 respondents, or 28%). It was seen by these respondents as needing a major overhaul, with more options in general, (such as enabling active travel, see below), and with greater choice in less populated areas and in rural areas
- transport is one of the key issues in sustainability and it is an area that needs great reform (10 of 46 respondents, or 22%). People will always travel so it is seen as an area where there can be an impact. One respondent said that ‘there are willing investments’ in this area, which is one reason they had chosen it.

“Reliable transportation will enable more to travel, minimising each citizens carbon footprint which in-turn will have tangible benefits for the health of future generations.”

“To be honest I do 1-6 already but traveling around by bike/public transport is the hardest. Costs are prohibitive, I can't easily use my bike to link with buses/trains (as they either do not carry bikes or sometimes don't have enough space) and linking buses is risky for getting stranded and takes a disproportionately long time. The changes set out would be brilliant - but please make sure there is increased space on buses / trains to take bikes!!”

“The energy consumption and air, noise and particle pollution resulting from our current reliance on the private car is unsustainable. A dramatic change in the way we move around is needed.”

- 4.14 Others had chosen travelling around as their favourite statement as they liked travelling and wanted to do so sustainably. Some mentioned that they chose the statement as they themselves lived in areas with poor public transport, and others chose it due to the need to curtail private car use:

“So many people are travelling the same routes and so many empty seats”

Reasons for choosing travelling around as least preferred statement

- 4.15 Most of the 54 respondents who had chosen travelling around as their least preferred statement and who had given qualitative responses, gave replies that



showed they could not imagine the scenario becoming reality, or that it was considered highly impractical.

- 4.16 Almost equal numbers of those who explained their choice argued either that public transport does not work for those who are elderly or less mobile (20 of 54 respondents, or 37%), or that public transport is extremely poor or non-existent where they lived or in other areas of Wales, especially so in rural areas (19 of 54 respondents, or 35%):

“I cannot imagine public transport ever being that good that I wouldn't need a car.”

*“Recently had to take my terminally ill parent for many appointments etc., can't do that on a ***** bicycle!”*

“I'm not convinced that public transport can replace car ownership in rural Wales. The freedom to go to an isolated beach on an evening or up a mountain shouldn't be confined by timetables, and to be frequent enough to be of use they would likely run empty for many hours.”

- 4.17 The next most cited reason provided by survey respondents for selecting travelling around as their least preferred statement related to the fact that they themselves preferred to remain local, or they felt that others should remain more local (8 of 54 respondents, or 15%).
- 4.18 The range of responses also suggested that massive improvement in public transport is necessary, that people enjoyed the independence and flexibility of owning private cars, and that it was unrealistic to expect less use of them. Some also expressed doubts about electric cars adding concerns about their cost, sustainable credentials, and the necessary infrastructure not being in place.
- 4.19 It is interesting that some survey respondents who viewed current public transport provision as extremely poor had selected this statement as their least preferred statement (as they could not envisage improvement), while others with the same viewpoint chose it as their preferred statement, because they wanted to see dramatic change to this element. Whilst there is consensus on the need for improvements, survey respondents have doubts about how realistic the depicted scenario can be in the future.



Using energy

My house has safe insulation and solar panels, and we capture rain and filter it through a communal garden in the street. When I do need extra energy, it comes from renewable power generated in Wales, including tidal power. I find that I'm using less energy for heating though as the house stays so warm

- 4.20 In all, 80 survey respondents who had chosen using energy as their top preferred statement and 24 who had chosen it as their least preferred one; provided a reason for their choice.

Reasons for choosing using energy as most preferred statement

- 4.21 Around half of the comments offered by survey respondents who had chosen using energy as their top statement (41 of 80 respondents, or 51%) centred around the significance of energy use in terms of environmental impact, with some impatience expressed at the lack of urgency on this matter:

"The climate crisis affects everything else. It's not just heating homes, it's industry, retail, offices, and public services that have to use less and use renewable. All public buildings should produce their own energy. Why is this not done now?"

"How we use and produce energy is going to be very important for the future of the planet. Also, the conversion process is very complicated and long. The sooner we start the better."

"Many of the problems that we now face are due to excessive, and increasing, use of energy from fossil fuels. Clean energy, and more efficient use of energy, would have great advantages for the environment with knock on effects to many aspects of everyday life."

- 4.22 An additional six survey respondents (six of 80 respondents, or 8%), along similar lines to the above, noted that they had chosen using energy as their preferred statement due to it being an area that needs improvement and development, or is the area where most change is needed:

"It's very difficult to choose but I selected this one because it's an area where there is much scope for change in our household and it would make a big



contribution to reducing global warming. I feel strongly about the other areas but are things that I already do or are out of my control.”

“I feel that all these things are important, but energy creates the largest carbon footprint and is where the most drastic action is needed, immediately.”

- 4.23 The second most cited reason for choosing energy as their top statement, mentioned by three-fifths of survey respondents (24 of the 80 respondents, or 30%, related to concerns about affordable sustainable energy and running cost concerns, with some referring to the importance of energy security as well, given the current energy crisis:

“We are in dire need of energy security now more than ever. Supporting people to generate at home through grants and investment in technology to improve cost and efficiency would be a huge step toward reducing inequalities. I feel like it's a good opportunity right now to push this agenda as it's personal to a lot more people. I don't need to mention the negative effects of how we create most of our energy right now.”

“It's important that everyone has access to affordable and green heating to stay well - especially in the light of what is happening with energy now.”

“It would benefit the poor as much as the rich, improve the climate and mean we were no longer hostage to the policies of UK government for energy prices.”

- 4.24 The third issue (cited by 13 of the 80 respondents, or 5%) related to personal intentions or past actions in terms of sustainable energy:

“We are seriously looking to make our home more energy efficient by installing solar for all our needs in the future which will be this year. We believe the way forward will be solar on a communal basis so a group of houses can install solar panels ...”

- 4.25 One survey respondent explained that sustainable energy would be life-changing for them:

“Because if we can use energy more efficiently and more sustainably it will have a knock-on effect for every other part of my life.”

- 4.26 Another five survey respondents had chosen using energy as their preferred statement because it seemed to be a realistic possibility or a good place to start:



“It feels like the most realistic, and least invasive option. And it’s a great place to start.”

“We have a climate crisis, and this can make a big impact fairly quickly if we want to. Transport is equally important to me but to achieve this will take longer and we need to act now.”

“It’s already possible just needs investment.”

4.27 Other comments made by survey respondents in relation to this statement encompassed concerns about the cost of installing sustainable energy (two respondents) and positive mentions of some particular energy types, such as tidal (four respondents) and nuclear (two respondents).

4.28 One respondent explained that they had chosen using energy as their preferred statement due to it being an area where government intervention was needed:

“It’s easier to make adjustments to the other things as an individual, but we have little choice about where our energy comes from. It is therefore vital that governments make the right decisions about where our energy comes from.”

Reasons for choosing using energy as least preferred statement

4.29 Just under half (11 of the 24 survey respondents, or 46%) of those who provided an explanation for choosing using energy as their least preferred statement actually provided a positive explanation for their choice, which raises questions about the validity of their selection. Ten of these 11 survey responses came from the roadshow survey. Two examples of these responses are set out below:

“There needs to be a national strategy re renewables and cost-effective fuel for all. Let’s have a national energy supply again!”

“The UK as a whole needs to effectively use its own renewable sources more.”

4.30 The main reason why survey respondents had choosing using energy as their least preferred statement related to concerns about energy costs, often alongside other issues (seven of the 24 respondents, or 29%):

“I’m worried about the increased prices of different energies.”

“Would like to reduce energy use given cost and environmental impact.”



- 4.31 The next most significant category of responses (five of 24 respondents, or 21%) covered the point that reducing usage of energy is a key issue:

“All energy consumption has a negative effect on the planet no matter how 'green' it claims to be. We all need to understand this and reduce our consumption if we are to slow down the damage we are causing.”

- 4.32 Other responses for choosing this as their least preferred statement, expressed concerns about some sustainable energy technologies, and that solutions were financially out of reach:

“I seem to be in a position where energy saving systems are not affordable to me. I have no ability to reduce my footprint in this area in any considerable way.”

“I have some concerns about the longer-term sustainability of some new technologies, e.g., wind and hydrogen. They also have impacts now that will affect future generations. The amount of concrete going into our landscape for wind turbines, water demand for hydrogen production etc. we don't want to jump from one impactful solution to the next. Mixed energy maybe and a focus on reducing demand.”

- 4.33 Other points made included that people should be free to make their own choices on energy, and concern that their own houses were unsuitable for retrofitting / adaptation:

“This will be quite difficult to achieve in our property as it is old and there is only so much that we can do.”

Buying food

I eat differently now to how I used to 20 years ago. I'm more conscious of the time of year that different fruits and vegetables are available because you see them in local markets. I may eat meat and fish, but I make sure I buy Welsh brands wherever I can, as I trust in the farming and fishing standards we have here.

Reasons for choosing buying food as most preferred statement



4.34 Of the 27 survey respondents who provided an explanation why they had chosen shopping for food as their preferred statement, just under half (13 of 27 respondents, or 48%) did so as they felt that locally sourced food was crucial, it was more sustainable as well as being better for the local economy. One person summed up many of these elements:

“Less mileage if local food is bought, which frees up more land to expand local producers. Food is obviously essential for us to survive and needs to be the starting point to affect everything else.”

4.35 Another survey respondent expressed similar sentiments:

“Food is fundamental to a functioning and sustainable system. If we are buying locally grown, seasonal food which is organic and plastic free then we will have made massive steps to reduce the negative impacts of humans on the environment. This would lead to systemic change and an overhaul of the current food growing and general living conditions of our country.”

4.36 Five of the 27 survey respondents (or 19%) chose buying food as their most preferred statement because it felt ‘easy’ or achievable for most people, or because it was an issue which they were very conscious about. Others in this category liked supporting local companies.

“This seems the easiest to start getting people to adapt to.”

“I could have ticked many boxes! But I am most conscious of trying to buy healthy & local food.”

4.37 Another five survey respondents (or 19%) noted that good food is important for health and that there was a need to improve food quality:

“You are what you eat. Industrial, chemical, gm editing, heavily processed should not form part of what you eat....”

“Food quality needs to improve, (be) of diverse variety, and be easily locally available.”

Reasons for choosing buying food as least preferred statement

4.38 In all, 18 survey respondents who chose shopping for food as their least preferred statement provided a reason for their choice. Of these, six respondents (or 33%)



noted that they already behaved like this, and so this statement was not preferred because it did not give them something to aim for in the future:

“Probably because I already do this, so it is not a change for me.”

- 4.39 Another six survey respondents (or 33%) disagreed with the phrase “I may eat meat and fish” set out within the statement, as they were vegan:

“Although I agree with buying local food, it’s difficult to see how this would affect me as a vegan. I wouldn’t buy local meat or fish. Some of the protein sources I rely on aren’t particularly Welsh!”

- 4.40 Other individual comments made by those who had selected the buying food statement as their least preferred statement included people wanting freedom to make their own choices, that it was already difficult enough to find affordable food, and that localism alone did not go far enough:

“Mere localism isn’t enough to ensure a liveable environment. Both overall calorie and meat consumption must be drastically cut to help restore our planet.”

Recycling

I’ve noticed that nearly everything you buy can be reused or recycled now – and there’s far less plastic around. I use the local refill shop too as we can get our cereals, flour, and sugar there. We spend more time shopping than we used to, but also buy more from local businesses that support their community

- 4.41 In total, 32 survey respondents who had chosen recycling as their top preferred statement and 14 who had chosen it as their least preferred one, provided a reason for their choice.

Reasons for choosing recycling as most preferred statement

- 4.42 The main reason given for choosing this statement as their preferred one related to recycling being essential for future sustainability, a feeling that we all have a responsibility to do so, and because not doing so uses up global resources (11 of 32 respondents, or 34%).



“Because the whole world produces commodities that are to be thrown out. Mend and repair should be foremost.”

“Many of the problems our environment (local and global) originate in our heedless over-consumption of natural resources. If we recycled everything, the strain on the environment would automatically reduce even though we were still producing food, timber and renewable energy and travelling.”

“As it is really important for saving our planet and the future of our family.”

- 4.43 The next highest category (five of the 32 responses, or 15%) were people making the point that the issue needs to be resolved at source, in that much more goods and packaging should be recyclable.

“I feel that there is more packaging that should be recycled (that is, designed and manufactured so it can be successfully recycled). I dislike not recycling anything. But suffer from 'wish cycling' i.e., putting something in the recycling that really (due to the nature of its manufacture) is possibly not suitable for recycling. This risks contaminating good recycling. I don't like this (examples would include foil lined cardboard cartons and polystyrene).”

“I am constantly frustrated with how difficult it can be to get things without non-recyclable packaging”

- 4.44 Four survey respondents (13%) chose this statement as its less use of plastic appealed to them:

“Want less stuff wrapped in plastic”

- 4.45 Three survey respondents each expressed:

- that we all need to recycle more, and do so more correctly
- that we need to throw away less things
- that this is an area that needs most improvement

“Too much of a throw away world when recycling can save so much money, reduce landfill and improve the environment.”

“I am not confident in the local recycling systems being effective.”

- 4.46 Some other views were that there was already enough "stuff" in circulation that can be reused, and that technology should develop in the future to make recycling more effective.



Reasons for choosing recycling as least preferred statement

4.47 The 14 survey respondents who provided an explanation why they had chosen recycling as their least preferred option, gave varied reasons. These included:

- the focus should be on using less, not just recycling
- concerns about statement wording i.e., recycling as a heading is too brief and there should be no plastic around in the future
- recycling was important but it should be made much easier
- refill shops should be much more affordable
- shopping in this way takes up a lot of time

4.48 Some quotes which illustrate these points include:

“We need to cut down on use rather than recycle. Refill shops are a good idea in principle, but they need to be more competitive on price!”

“I agree with this statement in the main, but I think we rely too heavily on the notion of recycling, because only a small percentage of what we put in our recycling boxes actually gets recycled. We need to phase out plastics and over-packaging and focus on reusing materials and refilling vessels instead. The statement about recycling does gesture towards these outcomes, but it is still headed 'recycling', placing the main focus on that.”

“I support recycling 100%, but I don't want to spend more time shopping than I do already; and I would like recycling to be much, much easier than it currently is - it's very difficult to know how to dispose of some items in the best way.”

4.49 Finally, one survey respondent expressed great concern about waste being sent abroad from the UK:

“Recycling seems to be a contentious issue. In the UK we don't appear to have good facilities able to recycle waste with the result being that we export it for reprocessing. This is a crime. The use of another, often poorer country to deal with our waste, after adding to global pollution and warming by shipping it around the world, with it ending up being recycled in poorly regulated facilities is a crime on a huge scale. It seems that we need much better ways of dealing with our own waste.”



Staycation

I'm having a staycation this year. I love that in Wales you can be next to the coast one day, and then in the mountains the next. And I can leave my car at home because Wales has a very good public transport network. Although its busy in the summer months, there are still quiet places you can find

- 4.50 A total of 14 survey respondents who had chosen staycation as their top preferred statement and 68 survey respondents who had chosen it as their least preferred statement, provided a reason for their choice.

Reasons for choosing staycation as most preferred statement

- 4.51 Half (seven of the 14 survey responses relating to the preferred statement explained that Wales (or Britain, one response) was beautiful, with much to offer:

"We have all the great places to visit, best beaches and countryside"

"If you love where you live, you don't need a holiday."

- 4.52 Other various answers were that people enjoyed the ease of staying in Wales, that it was cheaper and that local places had to be supported in case they are lost. Some stressed that they were already staying local.

Reasons for choosing staycation as least preferred statement

- 4.53 Just under half (30 of the 68 survey respondents, or 44% who had chosen staycation as their least preferred option and given a qualitative explanation), the highest category, said that they love to travel, that they liked or needed to travel to other countries, and that they didn't want to be restricted to Wales or the UK. This included people with family abroad.

"I do holiday in Wales and use public transport or cycle but would be sad if I could not travel abroad at all."

"Mainly I need to travel further to visit family in Italy and to get some sunshine - not the Welsh rain."

- 4.54 Another 22 of the 68 survey respondents (or 32%) had similar opinions, but emphasised the cultural benefits of visiting other countries:



“Being a very curious person, I love visiting and sharing in other cultures. I consider myself a citizen of the world rather than of a nation.”

“I still want to be able to go to other countries in a sustainable way in order to educate future grandchildren on art and history.”

- 4.55 The third reason provided by survey respondents (cited by 15 of the 68 survey respondents, or 22%) covered the point that sustainable holiday travel beyond Wales was somewhat possible or should be developed further:

“We would be lacking in empathy and outreach if we did not interact with the wider world. We should seek to build sustainable ways for international travel and not be constrained by our current limited technological choices.”

“Because it's nice to visit other countries (but not by flying to get there). Trains, ferries are much better.”

- 4.56 Many of these survey respondents emphasised that sustainable travel was still their aim while on holiday, and that the income generated by tourism is important for local economies:

“I still want to be able to experience other cultures, I want to travel sustainably and responsibly but tourism is an important factor in the economies of many countries - in order to generate the income, they need to build a more sustainable future.”

“I would like to mostly stay local for breaks (in the British Isles at least) but would allow myself one or two trips abroad a year without feeling too guilty. Hopefully, we'll have more sustainable long-distance transport available by then.”

- 4.57 Six survey respondents (9%) had chosen the statement as their least preferred one because they themselves did not go on holiday, or they felt that holidays were unnecessary:

“Holidays aren't compulsory; the rest [of the statements] are, for living.”

- 4.58 Other explanations for choosing staycations as the least preferred statement were wide-ranging, and included:

- that it is cheaper to holiday further afield
- negative effects of tourism in Wales with the proliferation of second homes



- it is an infrequent event, unlike the other statements which occur on a daily basis
- agreement with some clauses in the wording but not the staycation element.

4.59 The general thrust of the disagreement responses are that people really like to travel, both in Wales and beyond. Many are still conscious of the environment while doing so, or express that they hope to limit their travel, and that new developments will make long-distance travel less onerous on the environment in the future.

Green spaces

Where I live there is good access to green spaces. People use them for health, outdoor learning and just enjoyment. They are also managed for wildlife, with local volunteers helping to maintain these green spaces for people and nature. I notice more wildlife around where I live, such as birds and insects

4.60 In all, 69 survey respondents who had chosen green spaces as their top preferred statement and nine people had chosen it as their least preferred one, provided a reason for their selection.

Reasons for choosing green spaces as most preferred statement

4.61 The highest category of responses, cited by over a third (26 of 69 survey respondents, or 38%) were those who had chosen green spaces because of the leisure, wellbeing and health benefits green spaces bring to people.

“Green spaces are important for leisure opportunities, exercise, introducing children to nature and also vital for mental health reasons.”

“A part of my role is involved with re connecting people with nature which in turn leads to health and wellbeing benefits.”

4.62 Many people expressed the view that green spaces served the dual purpose of helping nature thrive and being important for human well-being:

“Because nature has been depleted so badly in the UK and many people are quite disconnected from it in general. The connection to green spaces is



beneficial to mental health and to development of younger people. There is the social aspect of this option too, which is appealing. I think all of the statements are attractive and we have the technology to achieve these things so the future should be quite hopeful in some regards.”

- 4.63 A total of 22 survey respondents (32%) mentioned that green spaces were key to many other aspects, such as wildlife habitats and the survival of wildlife, trees, and biodiversity, and this formed the second most cited explanation.

“We are living in a biodiversity crisis at the moment which is not being addressed sufficiently seriously. Our natural environment is very important to me.”

“If our land is not managed well that it impacts the most on ourselves and other species - and what we can and cannot do.”

- 4.64 The third-highest category (cited by 16 of the 69 survey respondents, or 23%) related to green spaces being important to them personally:

“I enjoy a walk up Aberdare Country Park every morning, it is so peaceful and a lovely way to start the day.”

“I live where I do because I value the green spaces and nature. I am aware that this area is getting more popular both to live in and to visit, and we have to work hard to keep a balance between maintaining the green spaces and also the needs of the wider community.”

- 4.65 Other explanations for choosing green spaces as their most preferred statement included six survey respondents (9%) pointing out the community-building aspects of green spaces, and five respondents (7%) who listed current poor practice in terms of green spaces:

“I think communal green space presents huge opportunities and benefits for people in both urban and rural areas, we need more of it integrated into our developments and landscape. Communal green space is a place where people can connect with the environment and why it is important, it can provide opportunities for nature, leisure, travel, food and energy production, sustainable drainage and more.”



“So fed up of green barriers and green spaces being eroded. People grabbing land for housing and maxing out the space with little thought for green space and biodiversity.”

- 4.66 A poignant remark from one survey respondent is a reminder that without true accessibility, living near a beautiful green space is meaningless:

“I do not live in the urban area but on the edge of a village which has both woodland field and hill walks. However, because of limited mobility I cannot always use these to the full advantage because of the types of stiles used in this area. I cannot use public transport because there is no raised kerb, and it is very infrequent. These lack of thought and action leave many people isolated though in a beautiful place.”

Reasons for choosing green spaces as least preferred statement

- 4.67 As was the case with the travelling around statement, there appears to be some error on the part of survey respondents who had selected this statement as their least preferred one, in that four of the nine explanations provided were positive in nature. These survey respondents stated that they personally enjoyed green spaces or noted that they were important for the environment.

- 4.68 Comments from the remaining survey respondents who chose green spaces as their least preferred statement included one respondent feeling that too many visitors can be detrimental:

“The more visitors to this area the greater the detrimental effect litter, congestion, erosion (see Pen y Fan). Not a NIMBY statement just factual. South Wales is a litter strewn mess in most populated areas. Turning the countryside into a playpark will be negative to a large degree.”

- 4.69 Other survey respondents expressed various individual views including that wildflower areas locally would be better than flower baskets and that this statement affects the carbon footprint less than other ones.

Land management

The land around me and in the countryside is used for producing a range of different foods but is also being managed for the benefit of communities. Land managers do this to reduce the impacts of flooding and ensure our



rivers and seas are clear of pollution. There is more variety in the landscape – different types of livestock, more wooded areas with different types of trees

4.70 A total of 59 survey respondents who had chosen land management as their top preferred statement and 16 survey respondents who had chosen it as their least preferred statement, provided a reason for their choice.

Reasons for choosing land management as most preferred statement

4.71 Just under half (28 of 59 survey respondents, or 47%) chose land management as their preferred statement as they considered it crucial, and at the forefront of climate change solutions, which affects nature, habitats, and biodiversity greatly. Survey respondents felt it affects many other dimensions (such as food shopping) and therefore it underlies many of the other statements.

“This point encapsulates elements of green spaces, food security, woodlands, and ecological conservation - all of which are extremely important to local communities. I think all the points are very important to our future, but this one came out on top for me because it combines parts of the others too.”

“At the forefront is how we use our land. The land is not a commodity - it is vital that it is managed correctly in order to sustain life on the planet.”

4.72 The next category of responses cited by a tenth of survey respondents (12 of 59, or 10%) drew upon current bad practice to explain why they had chosen land management as their preferred statement. They listed instances such as fly tipping, pesticide use, and slurry and sewerage in waterways. Overgrazing and the lack of wildlife habitats were also mentioned. One survey respondent recognised that this was a difficult area to tackle which was precisely why they had chosen this statement as a call to action:

“Many of these are equally important, but land management I believe will be the most challenging to change, hence why it was selected.”

4.73 The same number of respondents (12 of 59 survey respondents, or 10%) took the opportunity to explain their visions of the future with changed land management



practice. These respondents talked of local small scale food production, community food forests, as well as the need to consider urban land management and to better protect wildlife in the future:

“Just look out over the landscape and you can see clearly how changes could be made by linking up woodland for Wildlife corridors. Where more trees could be in hedgerows... not hedges for the ease of the hedge cutters... but remember the song trees for birds. Easy fixes. It’s so possible and NRW have great resources in their ecology and woodland teams.”

- 4.74 Others mentioned that they had chosen this statement as their preferred choice due to the community aspects arising from it, or due to it mentioning pollution.
- 4.75 As in the case of some other statements, a few respondents also made the point that the nine statements are very connected in reality, and that it is important to approach the subject matter holistically because of these interdependencies.

Reasons for choosing land management as least preferred statement

- 4.76 The 16 survey respondents who chose land management as the least preferred statement, did so because of the following considerations, set out in order of mentions:
- green land and woodland is being lost and urgent conservation measurements are required. Whilst this explanation might not be expected for “least preferred” selection, these respondents felt that the description in the statement did not reflect the reality that they now see around them, therefore change was difficult to imagine
 - not being sure what is most beneficial, and not understanding enough about the matter
 - not wanting people ruining the land and antisocial behaviour (see explanation in first point)
 - farming shouldn't be damaged by too much human and “outside” involvement
 - that “*Big Brother should not make the choices*”.



Woodlands

There are more woodlands in and around where I live. You can tell which forests are working forests and since more people from the community are involved, I go down there to see what's happening. They have some fantastic trails, activities, and events in the woods. Some areas are out-of-bounds as they are either taking the timber out, on working farms, or leaving them undisturbed for nature

4.77 A total of 33 survey respondents who selected woodlands as their preferred statement and 15 survey respondents who selected it as their least preferred statement, provided a reason for their selection.

Reasons for choosing woodlands as most preferred statement

4.78 Those choosing woodlands as their preferred statement conveyed two main points, with fairly equal numbers of survey respondents citing both of these:

- 14 of the 33 survey respondents (56%) remarked that trees and forest are crucial elements of the natural environment, creating habitats for wildlife, biodiversity and helping with carbon sequestration
- 13 of the 33 survey respondents (39%) commented upon the human use of woodlands, such as that trees and forests create a pleasant environment for people to use and help with desirable lifestyles. Woodlands were seen as a crucial element of green spaces

4.79 Some of the typical comments made by these respondents included:

“More woodlands more locally is achievable even though it’s not currently something I can use nearby. They benefit everyone, young, old, disabled, and able bodied. They sustain wildlife and give us learning opportunities on top of stress reducing options. We need more.”

“We live and move and have our very being in the environment. If we can't get this right, we are stuffed. Woodland, if we include a tapestry of various age and species of trees within stands, clearings for animals, both livestock and wild, gardens, orchards, dwellings, and workplaces, then we are getting close to what I think would be ideal. I.E. Permaculture design.”



“Without these woodlands we lose the lungs of our communities and all the positive elements that they bring to a fulfilling and healthy life shared with those around us.”

4.80 Other opinions were expressed about the community benefits of woodlands, and that better woodland management was needed:

“The council are destroying our woodland and green areas.”

“Woodland walks is the only place I feel free, even if only for a short time to get out of an old council estate where green areas are used as parking spaces, a place where tenants can't dream for tomorrow. It's quite sad. For me and my grandchildren woodland means freedom, peace, calming, a chance to breathe, a place to dream of one perfect day.”

4.81 Other survey respondents argued that Wales needs more woodland:

“We need more natural woodland in Wales, it has less natural countryside than other areas of the UK and trees help everything breathe. It should be predominantly native trees in order to support wildlife and bring nature back to us all.”

Reasons for choosing woodlands as least preferred statement

4.82 The comments offered by the 15 survey respondents who had chosen woodlands as their least preferred statement were varied, with one to three responses per reason raised:

- woodlands should not take over fertile farming land
- that there were already enough trees or forests
- woodlands were not considered relevant to them personally
- concerns about aspects of the statement wording, such as “working” forests
- the statement did not seem achievable
- concerns about poor woodland management practices.

4.83 Some of the comments offered by these survey respondents included:

“The landscape of mid Wales is already gifted with many wooded areas. The open hills are a special place, and I don't want to lose them to woodland which will take a generation to be anything like mature.”



“Wales has amazing woodlands, but I'm concerned that the government's current scheme is buying up productive farmland and planting woodland on it (to offset CO₂⁹ emissions). They are also pushing farmers to plant thousands of trees in order to access continued funding. I think this is a huge mistake and not the solution to our current problems. Farmers should be encouraged to grow food for human consumption (not for animal fodder). It's such a waste of a good resource). Wales could easily grow enough food to feed its people and not rely on England or other imported food. We could be totally independent. I don't want to live in a country with gorgeous woodland but no farmers because they've all been put out of business.”

“Because I currently live surrounded by a commercial forestry plantation, and it is nothing like the picture which the forestry sector and NRW like to portray. Public rights of way are routinely blocked permanently, rivers and watercourses are polluted by run off from felling operations and oil from machinery, archaeological sites are damaged and destroyed and habitat is disturbed and destroyed. Unless NRW begin taking swift and robust action to greatly improve the attitudes and working practices in commercial forestry the rosy picture you paint of the future will remain a fantasy.”

Reasons for not choosing a most or least preferred statement

4.84 A number of survey respondents did not choose a most or least preferred statement but provided a reason for not choosing one. In total, 27 survey respondents explained why they didn't choose a most preferred statement and 67 survey respondents explained why they didn't choose a least preferred statement. This section considers the key points made by these contributors.

Reasons for not choosing a most preferred statement

4.85 Three-fifth of the other comments offered (16 of 27 survey respondents, or 59%) centred around the fact that people felt that all nine statements were important, and that it was therefore very difficult to choose a preferred statement:

“I want all of it to happen, I want us to have lower impact on the planet, to live in greater harmony with nature, so we have a planet that isn't burning up or

⁹ Carbon dioxide



flooding, that isn't drowning in rubbish and landscapes that aren't totally devoid of their natural resources.”

“Because I found it impossible to choose just one of those, as they all make up the complete picture of a perfect future.”

4.86 One person explained how they had chosen their preferred statement:

“It's hard to pick as they are all important to me and intertwined with each other. Daily choices like food and clothing and green spaces would be the most important to me at the moment as I feel they would have most impact on my current day to day life.”

4.87 Six of the 27 survey responses (22%) were research criticisms, in that survey respondents felt that the statements were broad-brush, or that *“of course we all want these things.”* Two respondents said that their views were not reflected in the statements:

“I want to live in a future with fewer people and more wildlife - none of the above fit my choice.”

4.88 Other survey respondents felt that information on sustainable options was lacking or preferred to summarise their preferences for their future life:

“Options are there but access to info can be confusing”

“I want a simpler, more environmentally friendly lifestyle, taking less from the planet and giving more to the local community.”

4.89 One respondent described their own journey to sustainable living and stressed that sustainable solutions need to be accessible to all:

“I already try to live according to most if not all of these and have for some time. Transport and fuel are my biggest challenges currently, so looking forward to a future where public transport meets needs, and I can afford to swop to renewable sources of energy like solar panels or heat pumps. Just too out of reach for my pocket, ditto elec. cars. These all need to be made available more easily to the majority of the population not the minority.”

Reasons for not choosing a least preferred statement

4.90 A total of 67 survey responses explained why they did not choose a least preferred statement. Just under two-thirds of these (43 survey respondents, or 64%)



expressed great difficulty in choosing a least preferred option, stating again, as above, that all statements were important to them:

“I can’t decide which of these I wouldn’t want to live with.”

“Can’t pick one thing, as all of these are important for a sustainable future.”

“We need all of these - I don’t think I disagree with any.”

“This aspect of the survey is vague as I agree with the sentiment of all 9 statements. Thus, I would like to see Wales’s citizens, plus the visitors here, achieve some of the goals and quickly, starting by identifying the easy hits.”

“They all seem attractive to me, and many of them are how I try to live already.”

- 4.91 Three of the 67 survey responses (4%) were research criticisms, or respondents saying that they were unsure how to answer the question. Another three responses (4%) were personal comments on future living, such as:

“I cannot envisage ever being sufficiently eco-minded to embrace all new lifestyles with enthusiasm, but I would hope to shift my behaviour sufficiently to make a difference.”

- 4.92 Two comments were made suggesting that the statements were too utopian, and another two raised questions about their affordability, and people not being able to envisage achieving any of the goals:

“I would like to live more sustainably and be more environmentally friendly but economically this isn’t possible and is the same for a lot of people I know.”

“Find it hard to think about future especially with rising prices.”

- 4.93 Other individual comments offered included:

- listen to those in the know – not those with an agenda
- the countryside should not be open to all
- public transport and bikes are not solutions for all areas and some towns have no affordable shopping
- the statements do not go far enough, with one commenting:



“The statements don't go far enough for the changes required to save this planet and our species, the science is clear, and the majority have no intention of giving up their lifestyle and habits, as they are oblivious to the now dramatic changes taking place as the tipping points are falling like dominoes.”



5. Other issues raised by survey respondents

- 5.1 This chapter sets out any other issues raised by survey respondents during the second phase research not previously covered within this report.
- 5.2 Online survey respondents were given the opportunity to share any additional thoughts about the nine statements. A total of 164 online survey respondents provided comments and this section considers the main points raised by this cohort.
- 5.3 Over a quarter of the replies (44 of 164 survey respondents, or 27%) focused on the need for immediate action, with some giving multi-layered suggestions for action plans and what to prioritise. An additional five responses (3%) stated that more Government support is needed to enact the statements. Some of the typical comments offered by these survey respondents included:

“We must take decisive action now with stricter targets for governments to deliver with actual repercussions if targets are not met. Current promises are vague and non-committal.”

“Some people may think that installing green energy systems, buying local sustainably grown food and recycling are too expensive but the future costs will be far greater if we don't change our way of living and address the issues surrounding climate change. If we prioritise the basics for life such as good quality food, comfortable habitation and a clean environment, other greater costs for people are reduced in the long term with improved health and wellbeing through more social cohesion, less pollution, less waste and lower energy bills.”

“Need to educate people whatever age on how to shop and cook with basic individual ingredients, which are cheaper and more sustainable. We need to use less packaging altogether. We need to educate people about litter and fine those that do litter.”

“PLEASE GET ON WITH TIDAL ENERGY! Tidal is renewable. Tidal is more regular than clockwork. We have on our doorstep the second biggest tidal range on the planet and a basin to trap it We need an engineering study/competition to progress it please!”



- 5.4 Some of the survey respondents emphasised practicality and taking long-term effects into account:

“It’s important to be sensible and logical when planning for the future, not be panicked into fashionable “green” ideas which are not possible to implement, or which will eventually cause more environmental damage.”

- 5.5 The second highest category of responses, cited by around a third (22 survey respondents, or 13%), were positive or hopeful expressions for the future:

“It is a lovely dream; I hope it comes true for my grandchildren and for their descendants.”

“All of these futures are within reach given the technology we have available today.”

“There’s an emerging vision here for Wales that I’m very comfortable with.”

- 5.6 Following close in third place, with 19 survey responses (12%), focused on a belief that the aspirations expressed across the nine statements were unlikely to happen in their opinion. These survey respondents thought that the futures depicted were over-idealistic and utopian. They were doubtful that they could be realised, they felt that it would take too long and believed that other negative effects would counteract their efforts. Such comments included:

“In my capacity I try my best to reuse and think about my responsibility to the planet and nature. I do think everyone should try to live in a sustainable way. But industry and large organisations outdo any good a small person can make. It takes so long for legislations and new laws to be implemented. I know it’s all about finance but what good could be done is soon erased.”

“All of them are a bit fairy-tale like. We need a fully balanced Wales. In the coastal area where I live the public transport system is not suitable for working people going to work etc., - we need employment, we need industry we cannot all play in the woods after cycling or walking the 18 miles home from work to go home to our warm and cosy homes to eat organic vegan food.”

“Wonderful vision but unlikely to happen. I have no confidence in any government to implement changes necessary.”



5.7 In all, 24 of the additional survey comments (15%) offered related to the research itself. Five survey respondents (3%) expressed thanks or praise, whilst 19 (12%) made suggestions or criticisms, some about the multiple clauses set out in each statement. One respondent was worried about the reach of the research:

“I am suspicious that your surveys so far may not have reached the 40% who are indifferent - young people whose lives revolve around watching sport, clubbing, spending on the latest must-haves, etc, and low-income families relying on Aldi and food banks to get by. Even the 60% voting for change are unlikely to stop unnecessary spending, use public transport for leisure trips and supermarket shopping, etc. Beware of concluding that the people of Wales are ready to go enthusiastically with the vision - a welcome minority already are, more understand it and sympathise, but many will be too preoccupied to take much notice. That’s the challenge.”

5.8 Seven survey respondents (4%) made the point that the nine statements are all connected and that there is a need to look at the issues more holistically.

5.9 The same number of respondents simply expressed great concern for the future:

“I would like to live with all these things in the future, but it is going to be a long, hard slog to achieve most of them. I fear it will not be in my lifetime or my children’s and maybe not in my grandchildren’s lifetime.”

5.10 Slightly fewer (six survey respondents or 4%) expressed concerns about the cost and affordability of current green options, adding that cost of living issues need to be considered alongside these statements. Green options are often more expensive than other options:

“These measures are only an option for affluent people, forcing people into this will cause big problems.”

5.11 One respondent agreed on this point, and felt that taking away non-sustainable options was the solution:

“Some of them are doubtful for mass uptake as they will cost more or require more of people’s time but if you remove the other options then everyone is more likely to follow the greener way.”

5.12 A small number of survey respondents (six or 4%) expressed the view that many of the behaviours were more difficult in rural areas, and that the statements should be



6. Key findings from focus group discussions

- 6.1 This chapter sets out the key findings from the 16 qualitative focus group discussions. It is structured to consider the views of the key audiences who have been under-represented within the first phase of the research, namely ethnic minority communities, young people, the business community, and the farming community. Although one group (young people from the farming community) straddles two target audience we have considered their views as representatives of the farming community within this analysis.
- 6.2 We consider the views of different audiences on their collective most preferred and least preferred statements, and the arguments put forward for making these selections which often draw upon personal reflections. A summary of these preferred and least preferred statements by cohort are set out at Table 6.1.

Table 6.1: Top most and least preferred statements, by focus group cohort

Cohort	Most preferred statements	Least preferred statements
Ethnic minorities	<ul style="list-style-type: none"> • Green spaces • Using energy • Recycling 	<ul style="list-style-type: none"> • Staycation • Woodlands • Land management
Young people	<ul style="list-style-type: none"> • Using energy • Travelling around • Recycling 	<ul style="list-style-type: none"> • Staycation • Woodlands
Business community	<ul style="list-style-type: none"> • Land management • Recycling 	<ul style="list-style-type: none"> • Staycation
Farming community	<ul style="list-style-type: none"> • Using energy • Buying food 	<ul style="list-style-type: none"> • Green spaces • Land management • Woodlands



Most preferred statements

Ethnic minorities

- 6.3 There was no real consensus on the most preferred statements selected across the six focus groups held with ethnic minority communities. The statements which were most commonly selected as preferred ones were green spaces (four focus groups); using energy (four focus groups); recycling (four focus groups); and shopping for things (three focus groups). Travelling around was also selected by two focus groups and is therefore considered in this section.
- 6.4 The key points made by ethnic minorities for choosing these statements as their most preferred ones were:
- **Green spaces:** participants recognised that access to green spaces was important for their mental and physical health, and some recognised that it was not always easy for them to access such spaces as they lived in a city centre. Several participants observed that they were reliant on public transport to access green rural spaces whilst others noted that they would need a car in order to visit these spaces. Participants from two groups stressed the importance of having access to local green spaces such as children's playgrounds, flat places to walk and open spaces for sport and meeting friends. Another theme raised by participants under this statement was the lack of space for a garden to grow their own food, and there was incidental use of allotments to grow food. There was support for more communal gardens to grow food
 - **Using energy:** reducing energy usage and increasing green energy use were considered very important ways to reduce carbon emissions by this cohort. Participants were mindful however that changing behaviours had cost implications and several groups emphasised that environmentally friendly energy options had to be affordable for them. The role that government should play to fund renewable energy developments was highlighted, as was the expansion of good schemes such as new social housing which use green energy.



- **Recycling:** three of the focus groups stressed the importance of recycling but added that it wasn't always easy to do so, given that recycling systems vary from one local authority to another. Recycling in Wales was considered 'complicated' and inconsistent, and there was a real desire to see greater standardisation in recycling approaches across Wales. Those who were in rental accommodation in particular felt that information on recycling wasn't readily available to them. One group thought that real progress was being made in Wales around recycling but that greater promotion of local refill shops which are already available is needed. Another group was very concerned that much of the UK's waste ends up in African and Asian countries. A third group believed that recycling had now become a habit, and young members of this group thought that it was now culturally unacceptable not to recycle
- **Shopping for things:** there was much suggestion that participants were already quite thoughtful about the goods that they purchased and whilst some did so for environmental reasons, costs were the overriding consideration for most. Issues around affordability and accessibility were raised by most groups in relation to this statement. Participants in one group reported that they were mindful of the way that they shopped for things, in that they were looking to make healthy food choices, limit their purchase of goods with plastic wrapping and purchase items which would last where possible. Another group observed that they purchased second hand goods where possible, and get items repaired – sometimes using local repair cafes, recognising that the current cost of living crisis has impacted upon people's behaviour to live more frugally. A third group expressed concerns about fast fashion and the need to be more thoughtful about shopping choices. In this case, one participant was already running a clothing upcycling service for people within the community. The individual collected and redistributed these clothing items amongst those who needed them
- **Travelling around:** given many participants' reliance on public transport, travelling around was an important theme, and the cost and lack of regular services were highlighted as issues which prohibited greater use of such



services. These participants wanted to see public transport, which is more accessible, flexible, reliable, and cheaper. One group made greater use of private transport and as such, were less likely to see this statement as one which applied to them. On the other hand, another group were more inclined to suggest that they could live like this by walking more and making less use of their car for very short trips.

Young people

6.5 The main statements which were preferred on a collective basis by participants of the six focus groups with young people were:

- **Energy use:** this statement was selected because young people consider it a very challenging ambition which requires comprehensive solutions, and there is a view that progress to date has been slow, and action is urgently needed. Participants in one group highlighted the need to reduce energy consumption, improve insulation within homes, and achieve greater green energy market security. Young people commented that they find it difficult to reduce their own energy consumption when living in shared housing accommodation. Some also felt that they are more likely to live in badly insulated homes as they live in rental accommodation. Young people in one group emphasised that individuals cannot afford to make radical changes to their homes without grant funding support e.g., to purchase solar panels. Another group drew attention to the current energy crisis and wanted to see greater developments to generate clean energy, which in turn would create employment opportunities
- **Travelling around:** there was widespread use of public transport amongst this cohort, and it was chosen as a preferred statement because 'it's such an important part of everyone's daily life'. The themes covered by the statement were thought to affect young people directly. Participants often make use of public transport because they have to, when travelling to school or college, and decisions to use it for other purposes are influenced by cost and convenience. One group reported making good use of trains as opposed to buses, and decisions to do so is largely influenced by cost and convenience.



Participants frequently cited issues around public transport access, costs, and inflexibility. There was also some suggestion that there is stigma attached to using public transport in the UK, unlike in other countries. There was a call for safer cycling routes in urban areas and more integrated public transport. There was also a call for free or cheaper public transport. One group of older young people made greater use of a car and recognised that it would be difficult for them to get around without one. Participants in one group didn't know if this statement was achievable however, given the need for car use across rural areas and the lack of public transport in such areas

- **Recycling:** this theme was raised and discussed in detail across all groups. Participants were keen to stress that they recycle as much as possible, at home and at school or college, and younger cohorts were particularly passionate about recycling and concerned about littering. Young people broadly consider that Wales has good recycling practices, but that there is inconsistency from one authority to the next on how this is achieved. The good practice already in place across this theme was one reason why one group had not selected it as a collective preferred statement, as they thought progress needed to be on improvement rather than radical change (which they thought was required for some other statements). Overall, awareness of local refill shops was very low amongst this cohort
- **Green spaces:** young people thought that spending time in nature and green spaces is good for their mental health, especially given the level of use they make of phones and other devices. This cohort also recognise that green spaces are important for their communities and for supporting wildlife. However, they generally tend not to make much use of green spaces individually, and that their use of such spaces has reduced since their younger days when they would have spent more time in children's parks.

6.6 In addition to these preferred statements, much of the discussions with young people also covered the following two areas:

- **Buying food:** this statement was identified as a most preferred statement in two of the focus groups. A key common issue raised across several of the



groups was affordability of food, and the challenges of making changes to the food purchased during a cost of living crises when poorer quality food is often cheaper. Key considerations for young people relate to food convenience and cost, and shopping locally in different shops was thought to involve more work. It is worth noting that very few participants actually shopped food for their household, so their experiences drew upon their parental/carer behaviours, and in these cases their personal experiences were more restricted to the purchase of fast food and snacks. This possibly explains why so few of the groups collectively put this statement in their top three preferred statements. The rise in veganism and vegetarianism was mentioned by several groups, with some participants having chosen to do so because of environmental reasons. These participants observed that their change in behaviour had led to greater expense. A few focus groups suggested that locally sourced food needs to be ubiquitous, and that supermarkets should stock locally produced affordable food.

- **Shopping for things:** Several groups touched upon the purchase of second-hand clothing. Two groups argued that purchasing vintage and used clothing has become acceptable and 'on trend', driven in part by financial constraints but also due to this becoming more acceptable (via apps such as Depop and Vinted) and a fashionable way of purchasing clothes. However, another group thought that 'there's a bit of a stigma around it ... there's a lot of pressure to look good nowadays.' One group commented that they were buying less clothes that would last longer. Overall, however there was still a common acknowledgement that fast fashion was still a dominant trend, with social media pressure and affordability being key considerations. Online purchasing was another prominent discussion point for this cohort and some participants suggested that they would like to see more influencers and movements promoting the use second-hand clothing and sustainable shopping

Business community



6.7 The main statements which were preferred on a collective basis by one of the business community groups were recycling and land management. The other business community group did not think it appropriate to rank the statements in this way, so this exercise was not completed in that case. The main arguments put forward for selecting these two statements were:

- **Land management:** One group thought that rural areas lack biodiversity, due to farm animals being kept inside. The group suggested that there is a need for better regulation around farming practices such as around the control of pesticide use and fertiliser use. The other group were keen to see this statement cover the use of private driveways for the benefit of nature, wildlife and to reduce local flooding
- **Recycling:** Both groups thought that this is an important statement, and participants want to see increased regulation and incentivisation for businesses to use more recycled and recyclable materials, rather than plastic materials. Increased recycling could also provide direct economic benefits to businesses by reducing their costs. At present it was felt that businesses are being penalised for adopting sustainable behaviours e.g., having to pay more for business recycling bags, and that this was counterproductive to encourage more sustainable business behaviour.

6.8 Despite not ranking them as being important, business focus groups did give much consideration to the themes of:

- **Travelling around:** travel on public transport for business purposes was considered very difficult. Participants would like to have electric vehicles, but the costs and under-developed charging network were considered to be prohibitive at present
- **Using energy:** adopting sustainable energy and reducing their usage was considered important for businesses. Participants would welcome a policy which is less 'black and white' on energy, which accepts that people can continue to use wood burners domestically and which adopts a more creative approach to generating renewable energy



- **Catering:** this was considered to be a relatively under-developed consideration for businesses, and whilst being very environmentally aware, there is a tendency to do ‘what’s easiest’ in terms of catering. There was a suggestion that there are significant business opportunities for sustainable catering suppliers for the business sector
- **Green spaces:** One focus group suggested that businesses could make greater use of their outdoor and nearby green spaces for work meetings. One participant observed that outside meetings often led to freer discussions and was good for staff and client’s wellbeing.

Farming community

6.9 The two main statements which were preferred by the farming community groups were using energy and buying food, chosen by both focus groups as collective preferred statements. Shopping for things and recycling were also favoured by one group each. The main points put forward by these groups were:

- **Using energy:** This statement was selected by both groups in light of the issues currently being faced as a result of the energy crisis and increasing cost of supply.
- **Buying food:** Whilst this statement was selected as a collective preferred statement, more individual participants would have chosen it, had it did not make reference to ‘may eat meat and fish’. Nonetheless this statement was considered important for the farming industry. The focus on buying Welsh brands and having trust in farming and fishing standards was universally welcomed.

Least preferred statements

Ethnic minority communities

6.10 There was stronger consensus amongst focus groups participants from ethnic minority communities as to their least preferred statement, although one of the groups did not wish to select any. Staycation (selected across four of the five focus groups) was the most commonly cited least preferred statement, followed by



woodlands and land management (chosen by three focus groups each, although one group chose these two as their most preferred statements).

6.11 The key points made by participants from ethnic minority communities related to:

- **Staycation:** this was the least preferred statement amongst this cohort, with contributors arguing that they wanted to be able to travel to visit relatives, have holidays and see the world i.e., they liked travelling. Issues associated with poor public transport within Wales also accounted for this being a least preferred statement, as participants thought they would struggle to travel to popular rural and coastal tourist destinations by using public transport alone. One group observed that travelling by train in countries such as Italy was considered to be much easier than in Wales. Another group suggested that it was more expensive to holiday at home than abroad. One group also thought that they did not know much about what was available to them within Wales, and increased knowledge might make them consider staycations in the future. In this case, participants observed that there are limited opportunities to shop and source entertainment in some of the more rural and areas of Wales
- **Woodlands:** contributors identified this statement as a least favoured one, and overall, it seemed that the statement just did not engage this audience. One group didn't consider that this statement had an impact on their lives, so were less interested in it. Another group expressed more interest in developments associated with housing and employment, rather than woodlands. One group were more positive about the statement than others – for this group carbon sequestration was considered very important, as was rewilding and reforestation, and the importance of woodlands as habitats for nature and biodiversity
- **Land management:** it is worth noting that the focus groups were held in urban areas and because of this there was a definite bias towards living and working in urban environments, which might explain the lack of interest in this statement more generally. For instance, one group suggested that this statement did not have an impact on their lives. Although contributors



identified this statement as a least favoured one, one group was more supportive of the statement. They wanted to see farming practices changed in Wales, adopting a greater focus on planting crops and trees instead of farming livestock. The group recognised however that there are many different opinions on this matter

Young people

6.12 The main statements which were least preferred by young people were:

- **Staycation:** Young people considered it important to travel and so did not generally favour this statement. They also did not think that it was achievable. Participants noted that they were keen to see the world and different cultures, holiday in warm climates, and visit family based overseas. In light of the travelling restrictions imposed during the pandemic there was a renewed interest to travel abroad amongst this cohort. There was also a suggestion that holidaying abroad was cheaper than in Wales. The public transport element of this statement was considered problematic for many, which would make this statement unachievable. Despite this, there was agreement that staycations should be encouraged, and many participants reported having holidayed in Wales at some point during their childhood. There was a call for better visitor management in overcrowded tourist destinations such as Yr Wyddfa, given the increase in staycations in recent years over the pandemic period
- **Woodlands:** There was generally little interest in this statement amongst participating young people and there was some suggestion that it was not important in the areas where young people lived. Planting trees, it was argued, could also be detrimental to other habitats such as wildlife meadows and peatlands and one group expressed concerns about the practice of businesses offsetting carbon by planting conifer trees and unsuitable forests across Wales. However, one group did present a slightly different and interesting view of woodlands. Some participants at this group noted that they enjoyed visiting and camping in their local woods, as it provided them with a quiet and isolated space where they could enjoy themselves without



disturbing others (e.g., by playing music). They enjoyed being close to nature and the privacy from adult supervision that this space offered them

Business community

6.13 Only one of the two business community focus groups was prepared to select their least preferred statement, and staycation was overwhelmingly the least preferred option amongst these contributors. The main points put forward for selecting staycation was:

- **Staycation:** one group considered this statement to form a very small element of the solution to environmental issues, because it was not an everyday occurrence for people. One participant commented: 'staycation is important but in the grand scheme of things, its relatively small'. The other issue which participants conveyed about this statement related to its focus on public transport, and as Wales did not have good public transport it would be unlikely that this statement could be achieved. The other business group considered this statement from the perspective of business owners who were running holiday cottages, and observed that Welsh Government regulation around holiday letting and tourism tax could 'destroy' the sector, thereby putting the achievement of this statement at risk

Farming community

6.14 The three statements which were least preferred by the farming community groups were green spaces, land management and woodlands. The main point made by these groups applied to all three statements in that they were thought to have been drafted to suit 'members of the public' rather than the farming community and tended to paint a 'picture postcard' image of the countryside rather than a practical and real one. There was some suggestion that these three statements provided a 'theme park' interpretation of the countryside which didn't consider the cultural, economic, and social implications upon rural communities. It was not the case that they did not think these issues to be important, to the contrary, it was more a case that they disagreed with the focus and language of the statements themselves.



6.15 The specific points raised by farming community participants in relation to these three statements were:

- **Green spaces:** the term 'green spaces' was thought to work well in urban areas but not in the countryside
- **Land management:** there is no mention of the role of farmers as land managers across this statement. The statements also wrongly suggests that farmers are solely responsible for managing pollution and flooding
- **Woodlands:** there was concern about increased tree-planting as part of the woodlands statement as woodland development destroys communities, given that contractors rather than local people undertake the work. It was recognised that tree planting is a sensitive subject, given that policy and grant funding encourages the purchasing of land for tree planting purposes, and concerns were expressed about this approach not being sustainable. Contributors would be happier with a phrase such as 'the right tree in the right place' rather than 'more wooded areas with different types of trees'

6.16 There was also much discussion about staycation amongst these two focus groups, despite it not having been selected as a least preferred statement:

- **Staycation:** the main concerns which farming community representatives had about this statement was the impact on rural areas, particularly honeypot areas which struggle to cope with increased visitor numbers. However, the younger farming community cohort had less concerns about staycation, as they recognised the importance of diversification and tourism income for farmers and rural communities.

Broader considerations

6.17 This section considers some of the broader points and themes raised across the focus group discussions, by cohort.

Ethnic minorities

6.18 Ethnic minority communities stressed the difficulties associated with living more sustainably, particularly in terms of the additional costs involved, the lack of



knowledge they had on how to live more sustainably, e.g., on aspects such as recycling, and the need for support to do so e.g., making homes more energy efficient and using renewable energy sources:

- **cost of behaving in a more sustainable way** was raised frequently during discussions e.g., buying sustainable products is often more expensive, and cost is often the biggest consideration when shopping for things. The costs of public transport, be that buses or trains, needs to be lower, and free or cheap public transport would drive increased use
- **the need for support to live sustainably:** there was recognition of the role which government could play, and had already played, to change people's behaviour e.g., introducing single use plastic legislation in Wales. Participants called for improved financial support to help them live sustainably e.g., installing renewable energy sources such as solar panels in homes. Participants would also welcome support to become more self-sufficient by being able to grow their own food, such as via community allotments and gardens
- **greater information and knowledge:** several of the focus group discussions suggested that they would welcome more information about how to live more sustainably e.g., information about recycling processes so that people are better equipped to comply. One group also expressed their frustration at their lack of basic knowledge about what constitutes British seasonal foods. Two participants noted:

"a lot of this ... we don't know!"

"biodiversity, pollution and climate change ... they're not something I know about, understand or able to do anything about."

6.19 There was some suggestion across the focus groups that priority should be given to those statements where there hasn't been much progress to date. In this respect it was suggested that there has been good progress around recycling, and electric vehicles are becoming more commonplace a part of the using energy statement.

6.20 It is also worth noting that much of the discussions which took place within these focus groups focused on environmental issues which made life in an urban setting



easier, and to an extent more environmentally friendly e.g., what to do about waste and how to travel around, as opposed to what they perceived to be more 'rural' considerations such as woodlands and land management. One commented:

“Wales has too much green stuff. There is more of a need to build houses for people to live and build factories for people to work in...we don't need the green stuff.”

Young people

6.21 Some of the broader points raised by young people included:

- **choice of preferred statements is mostly influenced by two factors** – either those which have a direct impact upon their lives and which young people have control over to change, or ones they think where little progress had been made to date
- **cost and affordability are key considerations:** young people regularly referenced the cost and affordability of behaving more sustainably, and it was broadly suggested that some of the statements need to give greater consideration to the affordability of making changes
- **convenience and accessibility are also key considerations** raised by young people. It was commonly argued that changes in behaviour had to become easier choices for young people, and that sustainable options, such as in the case of buying food, shopping for things, and travelling around become more commonplace and widespread
- **they perceive themselves to be more eco-savvy:** participating young people frequently suggested that they are more eco-savvy than their older counterparts, in that younger people are more inclined to adopt positive behaviours such as good recycling practices and more prepared to embrace positive behavioural changes
- **they are highly influenced by family values and practices as well as social media:** participating young people regularly mentioned that their behaviours were influenced by family members' attitudes and practices, be that in terms of recycling practices at home or in the way their family



purchased food and other items. They also recognised the influence that social media had upon their awareness and behaviours.

Business community

6.22 Some of the broader issues raised by business community members included:

- **government regulation drives business behaviours:** whilst some business representatives had taken positive steps to reduce their impact upon the environment on a voluntary basis, it was recognised that greater regulation was required to change practices across all businesses. In the absence of more regulation, private sector operations will continue to focus on profit making at the expense of making environmentally better decisions
- **businesses should not be financially penalised for behaving more sustainably:** it was argued that businesses should not be financially penalised by local authorities, Welsh Government or UK Government for adopting more sustainably friendly practices e.g., paying more for business recycling bags; and purchasing sustainable products or services needs to be a cost-neutral change e.g., purchasing electric vehicles
- **the need for a holistic approach to better practice:** there was a broad desire to see progress being made in a more holistic manner across the statements presented. Several business representatives commented that the statements were inter-dependent and as such needed to be considered as equal

Farming community

6.23 The main broader points raised by the farming community focus groups were:

- **the proposed statements were viewed as complex and contained conflicting elements:** several participants noted that the statements contained 'too many conflicts' for them to be able to agree with them as they are. Some of the statements were viewed as controversial and contained contradictory elements
- **some statements, particularly green spaces, land management and woodlands, are urban-centric and idealistic:** it was thought that



statements had been drafted to meet the expectations of the public, rather than the farming community, and they lack any reference to the role of farmers as land managers. They also fail to consider the impact of change upon rural communities and employment. One contributor, who echoed the thoughts of several participants observed that the:

“Survey in its current form has the potential to be very dangerous, as they are idyllic wordings, and almost environmental fantasies.”

- **concerns were expressed about the research methodology:** in that the statements which they were asked to score reflected the views of ‘the people who took part in the survey’ and the questionnaire was considered to be ‘very leading’ as a result.



7. Reflections and conclusions

7.1 This second phase of the national conversation was intended to:

- test whether phase one respondents agreed with the interpretation of the phase one involvement exercise findings
- test whether under-represented groups agreed with the phase one involvement exercise findings and priority themes
- understand which statements people most or least agree with, and why
- help understand and acknowledge where the greatest areas of contention and consensus lie within and between the different cohorts
- identify common barriers and motivators for different visions of the future, and
- collect narratives and personal experiences initiated by the nine statements to help shape the vision.

7.2 Before setting out our concluding thoughts it is worth making some observations on the research approach adopted.

The research approach

7.3 The approach adopted has been effective in allowing us to better target and engage with individuals who might not otherwise have contributed to the national conversation. It has been important to reach out to individuals and groups who have not previously engaged with NRW and the subject area and use recruitment methods which do not rely on using NRW contacts and social media reach. As a result, the national conversation findings are now better informed by the views of a more diverse audience, rather than perhaps the views of those ‘already converted’ individuals who tend to be more actively engaged with environmental and sustainability issues, as was the case for the first phase of the national conversation.

7.4 Focus group sessions which have been arranged through existing interest and community groups have worked well to reach a more diverse audience. It is likely that the majority of these attendees would not otherwise have engaged in such a



conversation. The offer of a modest voucher to reimburse people for their time and efforts has also been important to secure a good attendance at individual sessions. Focus group discussions have yielded a valuable insight into the views of ethnic minority communities, young people, and those from the farming community although some caution must be taken when interpreting these views given the relatively small sample sizes involved, particularly in the case of the farming community. Despite their success, there are a few lessons to take on board when arranging any future focus group discussions, including better processes to identify the need for interpretation support, and to validate registrations from the business community prior to attending any online events which are promoted openly via social media.

7.5 Whilst the roadshow survey has equally allowed us to reach and capture quantitative data from new voices, this method has not been as effective in capturing the reasons behind individuals' choices and preferences given that the feedback provided by roadshow survey respondents was fairly limited. In other words, the roadshow survey has been helpful to identify *what* a more diverse audience think, but not necessarily *why* they think that. This is perhaps a lesson for future approaches where surveys are conducted at events, in that they are better suited to asking closed survey questions only of respondents to gather immediate reactions rather than more detailed insights. There is also a case for presenting shorter future scenario statements to roadshow survey respondents as they would be easier and quicker to digest. Despite this, the qualitative feedback gathered via the focus group discussions has provided a greater insight into the factors and influences which underpin attitudes and preferences.

7.6 Another issue which is worth highlighting is that despite testing, some of the statements proved difficult for some contributors to rank and express preferences. This was due to a range of factors, including people finding the statements complex and contradictory, or wanting more detail about the exact nature of actions leading to the futures described. Many contributors agreed with elements of the statements but disagreed with other elements which made it difficult for them to express preferences. Similarly, some contributors did not consider that the whole statement



was relevant to them, which made it difficult to form an opinion either way about it. Whilst it was possible to explore these issues with focus group participants and offer additional guidance or examples over the course of the session, it was not as easy to do so within a roadshow event setting where respondents had less time to engage in the survey. Should the roadshow survey exercise be repeated in the future, there may be a case for sharing shorter, easier to digest statements with respondents; or ensuring that roadshow interviewers check respondents understanding of statements and flag up any inconsistencies in their replies. It would also be possible to design the survey tool in a better way. For instance, the survey could flag up any inconsistencies in replies to the respondent by displaying a warning message, or that the options shown for the most or least preferred statement are those which respondents have scored the highest or lowest.

- 7.7 Whilst the approach has been effective in capturing the views of a more diverse audience, it continues to be the case that there is a lack of evidence around the views of the business community. The number of businesses who contributed meaningfully to the second phase conversation is low, and much of the views expressed by these individuals related to personal rather than business perspectives. Engaging representatives from businesses within any research study can be a challenge, and initial efforts to arrange in-person focus groups proved futile. NRW may wish to consider how this gap in evidence could be addressed in the future, for instance, through the establishment of a business stakeholder panel similar to the citizen panel being put in place or exploring opportunities to work collaboratively with business member organisations.
- 7.8 A general observation is that it has been challenging to provide enough time and space for people to really think about the longer-term future. Conversations at roadshow events and in focus groups both quickly turned to focus on the current situation and the barriers people face. Contributors were also keen to point out practical issues, or highlight specific actions that are needed, rather than to allow themselves space for imagination and creativity. There are possibly some psychological and cultural reasons to explain why this occurs – which can be related to the limitations of the time available, and the tools used. As a visioning



exercise, further consideration will need to be given to how to ensure those psychological and cultural considerations can be better factored into the next phase of the programme.

The findings

- 7.9 In setting out our key findings we return to consider the six key objectives of the second phase research. Two of the objectives (which statements people most or least agree with, and why; and the greatest areas of contention and consensus lie within and between the different cohort) are considered on a combined basis below.

Whether phase one respondents agreed with the interpretation of the phase one involvement exercise findings

- 7.10 The phase two exercise has shown that phase one respondents were supportive of the changes set out across the nine future statements in that they broadly want to live in the way described by the statements in the future. This suggests that phase one respondents agree with the interpretation of the phase one findings. Very few of the phase one respondents thought that there were gaps in the priority themes set out via the statements, which further reinforces the message that the statements provide good coverage of the issues which matter to them. The themes that the nine statements cover will provide a useful framework for conversations about a nature positive future.

Whether under-represented groups agreed with the phase one involvement exercise findings and priority themes

- 7.11 The phase two visioning exercise has shown that under-represented groups were also supportive of the changes described across the nine statements and want to live in this way in the future. The phase two research has shown however that there are clear differences between the findings gathered from the phase one online cohort and those of the roadshow survey and focus group cohorts, and this is a valuable conclusion. The main difference relates to the *strength of views*, in that the phase one online survey cohort expressed a much stronger desire that they want to live their lives as set out within the nine statements, whereas the roadshow survey and focus group cohorts gave lower scores to the statements. The differences in



opinions could be explained by the fact that online survey respondents are a sub-group of those who contributed to the first phase of the national conversation and tend to be more engaged, knowledgeable, and committed to environmental and sustainability issues than those who contributed via the roadshow survey and focus groups. This finding suggests that more work is needed to ensure that conversations about a positive future for nature continue to include those under-represented groups.

Which statements people most or least agree with, and why, and the greatest areas of contention and consensus lie within and between the different cohorts

- 7.12 There is a strong preference across all research cohorts to achieve the statements which focus on green spaces, shopping for things, recycling, and buying food. This suggests that there is broad consensus across all cohorts as to the statements which people most agree with. Three of these statements (the last three) are ones which contributors felt they could potentially influence and have some degree of control over at a personal level. Contributors attached value to green spaces for leisure, wellbeing and health benefits, and personal access to green spaces is a consistent theme raised across the research. Considerable importance was also placed on the value of green spaces for nature, biodiversity, and wildlife. Positive futures based on these four themes are likely to have more traction with a broader range of the population.
- 7.13 Whilst still overall supportive of them, there is less preference for (or perhaps more uncertainty about) those statements which focus on staycation and travelling around, largely because these statements were not viewed as achievable and realistic. Contributors from across all cohorts argued that they want to travel abroad and see the world, but there is scope to consider doing so in a way that inflicts the least amount of damage possible upon the environment. It is also worth noting that, perhaps unlike other statements, there was more consistency in the scores given across the three cohorts about least preferred statements, although not all contributors thought it appropriate to select any as they believed all of them were important. Further work is needed to understand the elements of these two statements that people see as unviable.



7.14 Some of the statements generated a more mixed opinion, in that similar proportions of people most and least preferred to live like the statements described. These include those statements which focus on using energy and land management, where contributors held very contrasting opinions about the future vision set out within the statements. The first phase online cohort were more likely than the roadshow cohort to choose using energy and land management as their most preferred statement. The analysis suggests that perhaps only part of these particular statements appeal, whereas other elements don't appeal to individuals. The findings reinforce the fact that the issues being explored within the statements are not clear cut, but rather very nuanced and complex in their nature. It should not be surprising that there is some degree of inconsistency between a contributor's scoring of the nine statements and their selection of most or least preferred statement. This finding suggests that more care is needed in the framing of these two statements in the future.

7.15 The research has provided a valuable insight on the use and relevance of terminology used across statements. For instance, the term green spaces does not resonate particularly well with contributors from rural areas, whilst those living in urban areas with very limited personal green spaces discussed how such spaces were important to them for a variety of purposes. In the same way, terms such as staycation and travelling around (using electric cars in particular) were not important to those who could not financially afford them, and these contributors attach greater importance to living more sustainable within the context of the energy crisis and increased costs of living.

Common barriers and motivators for different visions of the future

7.16 It is worth reflecting on some of the common barriers and motivators which have informed contributor's ranking and selection of most and least preferred statements. The evidence suggests that individual attitudes towards the environment and sustainability issues are influenced by a myriad of factors, not least factors such as family values and practices, knowledge, and social media. Individual behaviours are equally influenced by factors such as cost, affordability, accessibility, and convenience.



7.17 Some of the common factors which account for contributors' views and responses to the statements which have emerged from the research could be grouped into the following influences:

- **what people feel they have control over:** in many cases individuals and groups have focused on those statements which they felt are within their remit to change. Many contributors were less engaged and interested in some of the broader statements around woodlands and land management, as they did not see the direct relevance of them to their day to day lives
- **whether they are already doing the desired behaviour:** in these cases, contributors thought that they were already behaving and adopting practices which are in keeping with the vision set out within the statement and as such saw little scope to extend or change their behaviours. They preferred statements which require them to change habits and which they considered to be more ambitious
- **whether change is practical and realistic:** two of the statements in particular, staycation and travelling around, were challenged the most in terms of their practicality and contributors struggled to imagine them becoming a reality. Contributors found it difficult to imagine a future where they made greater use of public transport if, for instance, they lived in a rural area. In contrast, the recycling statement was considered to be more practical and achievable for individuals to adopt which might explain the stronger degree of preference expressed over this
- **what change will achieve the greatest positive impact:** some contributors were driven to select statements which they thought would lead to the greatest positive impact upon the environment and nature. The land management statement often fell into this category as contributors believed its implementation would bring about a large, positive impact upon the climate and nature crisis
- **where the greatest need for urgent action is:** the rationale for selecting particular statements was driven in these cases by a perceived need for urgent and dramatic action, and frustration at the lack of progress being



made, rather than how contributors would be affected by the statement described or how likely they would like to live in that way. In contrast, the progress made across some statements (recycling being the main one) provided reassurances to contributors that action was perhaps not as urgent, but should be about building on strengths rather than an overhaul of the approach

- **the cost and affordability of change:** this was a common consideration raised by all cohorts and identified as a real barrier to change. Living more sustainability was perceived to cost more and many contributors stressed the challenges this would pose for them. There was a strong argument that individuals would require financial support to invest in more sustainable solutions, such as in relation to some of the ideas set out in the using energy statement. Adopting more sustainable ways of living must be a cost neutral change for these contributors
- **the inconvenience and inaccessibility of change:** a common barrier raised by contributors to achieving many of these statements related to sustainable options being less convenient and not accessible to individuals. This was particularly true for everyday statements such as buying food, shopping for things, and travelling around where embracing a more sustainable way of living must be an easy and convenient change to make. We concluded that contributors are more likely to value a future statement that they believed was convenient and within reach.

7.18 It will be important for any future involvement exercise to reflect upon, and address each of these common influences, in the way themes are presented to the public.

Narratives and personal experiences initiated by the nine statements to help shape the vision

7.19 The research findings set out at Chapter 4 (survey respondents' feedback on the future statements) and Chapter 6 (key findings from focus group discussions) set out individual narratives and personal experiences relating to the themes presented across the nine future statements. The arguments put forward for making selections around most and least preferred statements often draw upon personal reflections



and experiences. Some of these personal stories have been collated with the help of a third-party digital sound artist in a series of audio works that will be made available alongside this report. Chapter 6 also considers some of the themes raised by specific under-represented audiences, including young people and ethnic minority communities.



Annex A: Research instruments

Discussion guide for face to face focus groups

This discussion guide is intended to be used flexibly and will not be used to ask questions verbatim: it will be tailored according to the contributors' knowledge and areas of interest.

1. Introductions – Please introduce yourself and tell us where you're from

[Share paper handout of statements with attendees]

We have considered what people have already told us as part of the national conversation to develop nine statements about the future and what life could be like. These are set out on your paper handout. They cover issues such as how we travel, how we use energy, how we shop and buy food as well as how we manage land and woodlands. The first six statements focus on your own personal behaviours whilst the last three statements focus on the community and environment around you.

I'd like you to take a few minutes to read these nine statements and consider for each one how much you would like to live in the future in this way, based on your own personal situation and experiences.

I'd like you to score each statement on a scale of 1 to 5, with 1 being you would not at all want to live like that and 5 being you would definitely want to live like that. We'd like to collect these sheets at the end of the session.

Personal reflection

2. I'd like to you pick one statement from the list and tell me what you do in relation to that behaviour.
 - a. Why do you behave in this way?
 - b. What makes it difficult to change your behaviour?
 - c. What would make it easier for you to change your behaviour?
3. Of these nine statements, which one would you pick as the most likely to describe how you would like to live in the future?
 - a. Why have you chosen this particular statement?



- b. What is it that appeals to you about this statement?
4. Of these nine statements, which one would you pick as the least likely to describe how you would like to live in the future?
 - a. Why have you chosen this particular statement?
 - b. What is it that doesn't appeal to you about this statement?

Collective reflection

5. Having considered which statements appeal to you personally, I'd now like you to work as a group to agree upon the top three statements which you think are most likely to be desirable ways of living in the future.
 - a. Which three statements would you select?
 - b. Why do you think these are the most desirable to take place?
 - c. Do you think that these three statements should be the priorities for a future vision for Wales?
 - d. What needs to happen for these statements to become reality? That is, what action or change needs to take place?
6. Similarly, I'd now like you to work as a group to identify three statements which you think are the least desirable ways of living in the future?
 - a. Which three statements would you select at the bottom three?
 - b. Why do you think these are the ones least likely to take place?
 - c. How, if at all, could these bottom three statements be improved?
 - d. What would need to change for these statements to become more likely to be achieved? That is, what action needs to take place?

General feedback

7. Reflecting upon the nine statements more generally, what do you think of them? Are these the kind of things that are important for our future?
 - a. Why do you say this?
 - b. What changes or improvements, if any, could you make to any of the statements?
 - c. Are there any other themes or actions which should be included in a future vision? That is, are there any gaps in the issues being covered?



Roadshow survey

My name is _____ and I'm here on behalf of a project called "Nature and Us", which has been holding a national conversation on the future of the natural environment. The idea is to develop a shared vision for nature and the people of Wales and we are interested in your views on what you would like the future to look like for you and your family.

Do you mind sparing a few minutes for me to ask you some questions?

We won't be keeping any of your personal information – so nothing can be attributed to you – is that ok?

Although a shared vision will be positive about the future of the natural environment, it also needs to be realistic. This starts with an honest discussion about what people in every part of Wales feel is possible and practical to change to benefit the environment. It is only by understanding the barriers to change that we can develop a vision that everyone feels able to support and get behind.

Can I check if you'd like to complete the survey in:

- English
- Welsh (United Kingdom)

So I'm going to read out a series of statements that have been collected from what people in Wales have been telling us about their vision for the future and what their life could be like. When we are talking about the future, we mean in about 20-30 years' time.

After listening to each one, I'd like you to tell me how likely you think it portrays how you would like to see yourself living in the future, based on your own personal situation and experiences.

I'd like you to score each statement on a scale of 1 to 5 (with 1 being you would not at all want to live like that and 5 being you would definitely want to live like that).

After we've been through them, I'll show you all the statements again and ask you to pick the one that you feel appeals to you most, as well as the one that you feel is least likely to



describe how you would like to live in the future. I'll then ask you what might have made you choose those two statements in particular.

So, here come the STATEMENTS in no particular order...

	1	2	3	4	5
	Not at all	A bit	Quite a bit	Quite a lot	Definitely
<p>1. Shopping for things. I am thoughtful about the clothes, food, and household goods I buy. I try to look for things that last longer and can be repaired. I choose local products or things that are recycled or second hand. I do this as it is easy to find local people who will mend broken things, and it reduces the amount of resources I am using.</p>					
<p>2. Travelling around. I walk, cycle, or take public transport a lot more now when I need to travel. The transport system is flexible, so it can be used by people with different mobility needs. There are plenty of facilities for electric car charging and for car-sharing. The options and choices are so widespread and connected, fewer people use their own cars for shorter trips now and the air is cleaner.</p>					
<p>3. Using energy. My house has safe insulation and solar panels, and we capture rain and filter it through a communal garden in the street. When I do need extra energy, it comes from renewable power generated in Wales, including tidal power. I find that I'm using less energy for heating though as the house stays so warm.</p>					
<p>4. Buying food. I eat differently now to how I used to 20 years ago. I'm more conscious of the time of year that different fruits and vegetables are available because you see them in local markets. I may eat meat and fish, but I make sure I buy Welsh brands wherever I can, as I trust in the farming and fishing standards we have here.</p>					
<p>5. Recycling. I've noticed that nearly everything you buy can be reused or recycled now – and there's far less plastic around. I use the local refill shop too as we can get our cereals, flour, and sugar there. We spend more time shopping than we used to, but also buy more from local businesses that support their community.</p>					



	1	2	3	4	5
	Not at all	A bit	Quite a bit	Quite a lot	Definitely
<p>6. Staycation. I'm having a staycation this year. I love that in Wales you can be next to the coast one day, and then in the mountains the next. And I can leave my car at home because Wales has a very good public transport network. Although its busy in the summer months, there are still quiet places you can find.</p>					
<p>7. Green spaces. Where I live there is good access to green spaces. People use them for health, outdoor learning and just enjoyment. They are also managed for wildlife, with local volunteers helping to maintain these green spaces for people and nature. I notice more wildlife around where I live, such as birds and insects.</p>					
<p>8. Land management. The land around me and in the countryside is used for producing a range of different foods but is also being managed for the benefit of communities. Land managers do this to reduce the impacts of flooding and ensure our rivers and seas are clear of pollution. There is more variety in the landscape – different types of livestock, more wooded areas with different types of trees.</p>					
<p>9. Woodlands. There are more woodlands in and around where I live. You can tell which forests are working forests and since more people from the community are involved, I go down there to see what's happening. They have some fantastic trails, activities, and events in the woods. Some areas are out-of-bounds as they are either taking the timber out, on working farms, or leaving them undisturbed for nature.</p>					

So, thinking about the future and what you feel could be possible, which one of these statements most describes how you would like to live?

- 1. Shopping for things
- 2. Travelling around
- 3. Using energy
- 4. Buying food
- 5. Recycling
- 6. Staycation



- 7. Green spaces
- 8. Land management
- 9. Woodlands
- Don't know
- Not answered

Great, now can you tell me in your own words, why you feel this?

Thank you for that. Now, thinking about how you live now, which one of the statements do you feel least describes how you would like to live in the future?

- 1. Shopping for things
- 2. Travelling around
- 3. Using energy
- 4. Buying food
- 5. Recycling
- 6. Staycation
- 7. Green spaces
- 8. Land management
- 9. Woodlands
- Don't know
- Not answered

OK, so now can you tell me a little bit about why you feel this?

Do you wish to make any other comments?



Online Survey

The “Nature and Us” project has been holding a national conversation on the future of the natural environment. The idea is to develop a shared vision for nature and the people of Wales and we are interested in your views on what you would like the future to look like for you and your family.

We are working towards a vision of the future where all parts of our society are included, empowered, and enabled to come together to take action for the natural environment

We would be grateful if you could spare a few minutes to answer some questions. You won't be required to share any personal information so your responses will not be attributed to you in any way.

Hoffech chi gwblhau'r arolwg yn / Would you like to complete the survey in:

- Saesneg / English
- y Gymraeg / Welsh

The following statements, in no particular order, have been collected from what people in Wales have been telling us about their vision for the future and what their life could be like. When we are talking about the future, we mean in about 20-30 years' time. For each one, please note how likely you think it portrays how you would like to see yourself living in the future, based on your own personal situation and experiences. You will then be asked to pick the one that you feel appeals to you most, as well as the one that you feel is least likely to describe how you would like to live in the future, and why that is.

Please score each statement on a scale of 1 to 5 (with 1 being you would not at all want to live like that and 5 being you would definitely want to live like that).

	1	2	3	4	5	
	Not at all	A bit	Quite a bit	Quite a lot	Definitely	Don' t know
1. Shopping for things. I am thoughtful about the clothes, food, and household goods I buy. I try to look for things that last longer and can be repaired. I choose local products or things that are recycled or second hand. I do this as it is easy to find local people who will mend broken things, and it reduces the amount of resources I am using.						
2. Travelling around. I walk, cycle, or take public transport a lot more now when I need to travel. The transport system is flexible, so it can be used by people with different mobility						



<p>needs. There are plenty of facilities for electric car charging and for car-sharing. The options and choices are so widespread and connected, fewer people use their own cars for shorter trips now and the air is cleaner.</p>					
<p>3. Using energy. My house has safe insulation and solar panels, and we capture rain and filter it through a communal garden in the street. When I do need extra energy, it comes from renewable power generated in Wales, including tidal power. I find that I'm using less energy for heating though as the house stays so warm.</p>					
<p>4. Buying food. I eat differently now to how I used to 20 years ago. I'm more conscious of the time of year that different fruits and vegetables are available because you see them in local markets. I may eat meat and fish, but I make sure I buy Welsh brands wherever I can, as I trust in the farming and fishing standards we have here.</p>					
<p>5. Recycling. I've noticed that nearly everything you buy can be reused or recycled now – and there's far less plastic around. I use the local refill shop too as we can get our cereals, flour, and sugar there. We spend more time shopping than we used to, but also buy more from local businesses that support their community.</p>					

Thinking about the future and what you feel could be possible, which one of these statements most describes how you would like to live?

- 1. Shopping for things
- 2. Travelling around
- 3. Using energy
- 4. Buying food
- 5. Recycling
- 6. Staycation
- 7. Green spaces
- 8. Land management
- 9. Woodlands
- Don't know

